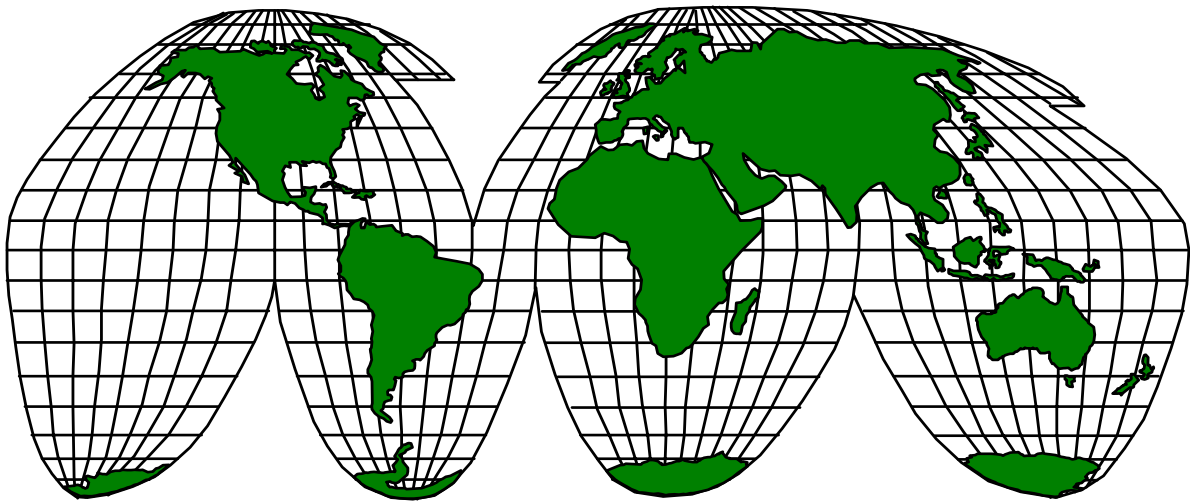


# Overseas & Mexican Visitors To California

**2005**



A Joint Marketing Venture of  
The California Travel and Tourism Commission  
& The California Division of Tourism

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**EXECUTIVE SUMMARY**  
**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA**  
**(2005)**

- **Total Overseas Market.** There were approximately 21.7 million overseas visitors to the U.S. in 2005, up 6.9% from 20.3 million in 2004. Approximately 4.8 million overseas visitors (22.1%) indicated California was a destination on their U.S. trip, up 14.3% from 4.2 million overseas visitors to California in 2004.
- **Mexican (Air).** There were 1,668,000 Mexican travelers who arrived in the U.S. by air in 2005. Approximately 496,000 (29.7%) of these Mexican travelers visited California during their U.S. trip.<sup>1</sup>
- **Country of Origin.** California's top ten overseas visitor market countries were:

|     |                        | <b>Number of<br/>California Visitors</b> |                    | <b>Percent Change<br/>2004/2005</b> |
|-----|------------------------|--|--------------------|-------------------------------------|
|     |                        | <b><u>2004</u></b>                       | <b><u>2005</u></b> |                                     |
| 1)  | United Kingdom         | 693,000                                  | 778,000            | 12.3%                               |
| 2)  | Japan                  | 630,000                                  | 722,000            | 14.6%                               |
| 3)  | Australia              | 259,000                                  | 313,000            | 20.8%                               |
| 4)  | Germany                | 275,000                                  | 309,000            | 12.4%                               |
| 5)  | France                 | 215,000                                  | 261,000            | 21.4%                               |
| 6)  | South Korea            | 273,000                                  | 252,000            | -7.7%                               |
| 7)  | Taiwan (ROC)           | 177,000                                  | 191,000            | 7.9%                                |
| 8)  | China (excl.Hong Kong) | 101,000                                  | 146,000            | 44.6%                               |
| 9)  | Philippines            | 109,000                                  | 116,000            | 6.4%                                |
| 10) | Netherlands            | 115,000                                  | 114,000            | -0.9%                               |

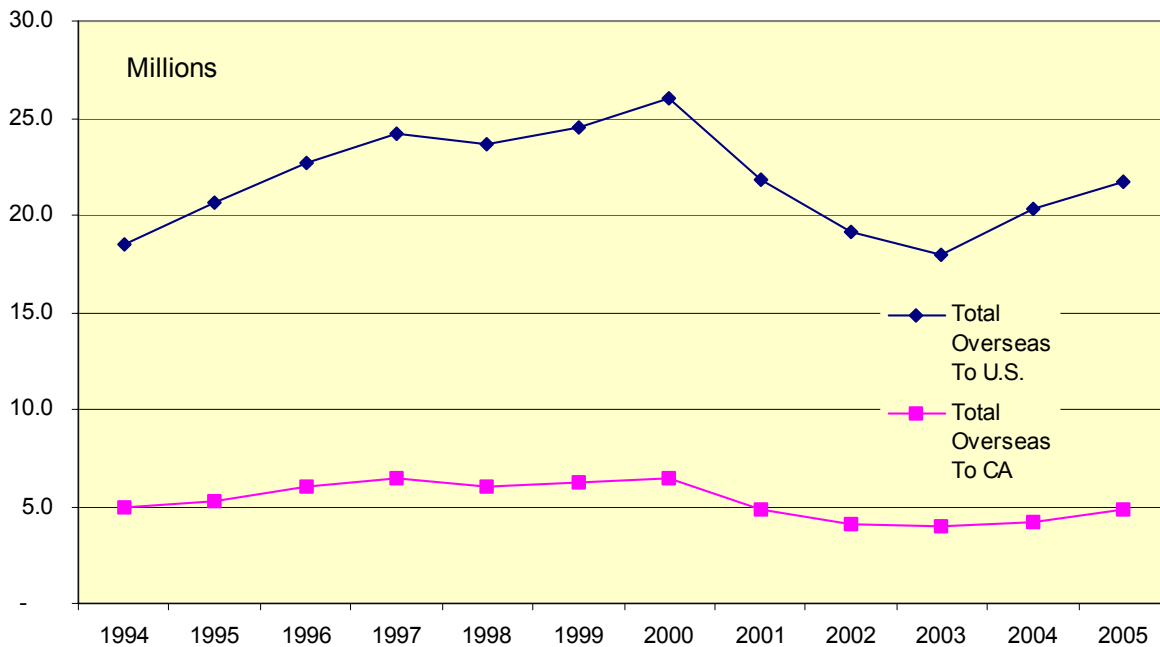
In 2005, the U.K. and Japan make up slightly less than one-third of the overseas visitors to California. The number of U.K. visitors to California in 2005 increased by 12% to 778,000, and Japanese visitors increased by 15% from 630,000 in 2004 to 722,000 in 2005. Visitors from China followed by those from Australia and France had the highest percentage increase in visitors from 2004 to 2005, increasing by 45% (China) and 21% for each of Australia and France. South Korea showed a decrease of 8% in the number of visitors to California in 2005 compared with 2004.

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<sup>1</sup> The majority of Mexican visitors to California in 2005 arrived by ground transportation through a U.S. border port of entry. Mexican visitors arriving in the U.S. by ground transportation are not included in the "In-Flight Survey" and are not included in this study. Please note that Canadians are also not included in the In-Flight Survey or this study.

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### Total Overseas Visitors To The U.S. and California



- **Market Share.** Among the ten largest overseas markets, California's share of visitors from Australia, Germany, France, U.K., Japan, China, and Taiwan increased, while the market share for South Korea, the Netherlands, and the Philippines, decreased in 2005.
- **Decline in Overall Market Share.** California's market share of overseas visitors to the U.S. has recorded a general decline since the late 1990s. In 1997, California's market share of overseas visitors to the U.S. was 26.6%. By 2004, California's market share had dropped to 20.7%. However, in 2005, the market share increased 6.7% to 22.1%.

#### California Market Share of U.S. Visitors By Country

|                            | <u>2004</u> | <u>2005</u> |
|----------------------------|-------------|-------------|
| 1) United Kingdom          | 16%         | 18%         |
| 2) Japan                   | 17%         | 19%         |
| 3) Australia               | 50%         | 54%         |
| 4) Germany                 | 21%         | 22%         |
| 5) France                  | 28%         | 30%         |
| 6) South Korea             | 44%         | 36%         |
| 7) Taiwan (ROC)            | 60%         | 60%         |
| 8) China (excl. Hong Kong) | 50%         | 54%         |
| 9) Philippines             | 76%         | 75%         |
| 10) Netherlands            | 27%         | 25%         |

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- **Main Destination.** Approximately three in four (72%) overseas visitors to California indicated that California was their main destination, similar to that reported in previous years.
- **California MSAs Visited.** Similar to last year's data, the most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California included Los Angeles - Long Beach (55%) and San Francisco (45%), followed by San Diego (11%), Anaheim-Santa Ana (8%), and San Jose (7%).
- **Purpose of Trip.** Overseas travelers to California listed multiple reasons for their trip including: vacation (59%, the same percentage as in 2003 and 2004), visiting friends/relatives (41%) and business (31%). Compared to other overseas travelers, visitors from India (62%) and China (61%) have the highest proportion of business travelers, while visitors from the U.K. (74%), and Australia/New Zealand (71%) have the highest proportion of travelers on vacation/holiday. Overseas travelers from Taiwan (52%) and Australia/New Zealand (51%) are more likely to visit friends/relatives than any other overseas visitors to California.
- **Leisure/Recreation Activities.** Shopping (89%), dining (86%), and sightseeing (53%) were the most common leisure and recreation activities of overseas visitors to California in 2005. More than 94% of visitors from Singapore as well as Malaysia and 92% reported shopping as one of their leisure activities. In addition, more than 91% of visitors from the U.K. as well as Australia/New Zealand reported dining in restaurants.
- **Use of Travel Agents.** Travel agent usage has declined steadily over the last several years. Travel agents were used to book 57% of air trips in 2005. Visitors from Australia/New Zealand (76%) reported the highest dependence on travel agents to book their air trips. Only 26% of overseas travelers relied on travel agents to make lodging arrangements, 10% reported contacting hotels/motels directly, and another 10% reported that their company's travel department booked hotel rooms for them.
- **Accommodations.** Almost eight in ten overseas travelers to California reported staying in hotels or motels at some time during their trip (79%). Visitors from U.K., Singapore, Malaysia and Japan reported the highest hotel usage of visitor groups (each over 87%). Visitors from India reported the lowest hotel usage (53%).
- **Sex and Age.** Similar to results from previous years, two-thirds (63%) of overseas travelers to California during 2005 were adult males and slightly more than one-third (37%) were adult females. During 2005, the average age of traveling adult males (43 years old) was two years older than the average traveling adult female (41 years old).
- **Length of Stay.** During 2005, California's overseas visitors spent an average of 20 nights in the U.S. and 11 nights in California, these numbers are the same as those from 2004. Visitors from India reported the highest number of nights stayed in the U.S. (53 nights) as well as in California (36 nights). Visitors from Mexico and Japan reported the least amount of time spent in the U.S. (8 nights and 10 nights respectively) as well as in California (6 nights and 7 nights respectively).

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- **Use of Domestic Airlines and Rental Cars.** More than four in ten overseas visitors to California made use of a taxi/cab/limousine or airlines (41% each respectively) as transportation means within the U.S. These were followed by use of a rental car (35%) and company or private auto (34%). Visitors from Germany were most likely to rent an auto, while visitors from India were least likely. Visitors from Australia/New Zealand and India were the most likely to fly between U.S. cities, and visitors from China were most likely to make use of a company or private auto.
- **Advance Trip Decision.** The average overseas visitor to California decides to travel a median of 60 days prior to the actual trip, ten days more than the 50 days reported in 2004. In 2005 visitors from the U.K. followed by those from Australia/New Zealand planned their trip the longest time in advance (median = 100 days and 90 days respectively).
- **Advance Ticket Purchase.** Overseas visitors to California purchased their airline ticket a median of 30 days prior to the actual trip. Visitors from South Korea (median = 14 days), followed by those from Taiwan, China and India (median = 15 days), reported the shortest time frame from airline reservation to departure date. On the other hand, visitors from the U.K. reported the longest time frame from airline reservation to departure (median = 80 days).
- **Travel Party Size.** Consistent with results from the previous year, the average travel party size for all overseas visitors to California during 2005 was 1.5 people. Visitors from Mexico, Australia/New Zealand and Singapore were the most likely to include children (13%, 12%, and 12% respectively).
- **Prepaid Trip Package.** Package tours were used by 15 percent of all 2005 visitors to California, the same as that reported in 2004. During 2005, visitors to California reporting the highest use of inclusive tours were from the U.K. and Germany (22% and 20% respectively).
- **Expenditures in the U.S. – “All to California” Visitors.** Expenditures in the U.S. during 2005 rose from 2004, averaging \$103 per person per day (average expenditure in 2004 was \$95 per day). In 2005, overseas visitors' total trip expenditures averaged \$3,985 compared with \$3,751 in 2004. Visitors to California from Japan (\$176) and from Mexico (\$175 - caution small sample size) reported the highest average daily expenditures.
- **Expenditures - "California Only" Visitors.** Visitors to the U.S. who only visited California, had total trip expenditures averaging \$3,366 in 2005, compared with \$3,209 in 2004. Their average daily expenditures in the U.S. (\$102) were also higher than those reported in 2004 (\$88).

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**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA\***  
**SELECTED HIGHLIGHTS**  
**(2005)**

|   | All Overseas<br>Visitors  | United<br>Kingdom        | Germany                      | Australia<br>New Zealand | China<br>w/o HK           | India                          | Japan                    | Malaysia           | Singapore         | South<br>Korea            | Taiwan                    | Mexico<br>(Air)          |
|---|---------------------------|--------------------------|------------------------------|--------------------------|---------------------------|--------------------------------|--------------------------|--------------------|-------------------|---------------------------|---------------------------|--------------------------|
| Estimated Travelers   | 4,791,000                 | 778,000                  | 309,000                      | 402,000                  | 146,000                   | 98,000                         | 722,000                  | 28,000             | 65,000            | 252,000                   | 191,000                   | 496,000                  |
| Business<br>(% Change 2004/2005)                                  | 31%<br>(-2%)              | 18%<br>(+1%)             | 34%<br>(+7%)                 | 21%<br>(-15%)            | 61%<br>(+7%)              | 62%<br>(+20%)                  | 41%<br>(+17%)            | 51%<br>N/A         | 42%<br>N/A        | 41%<br>(+7%)              | 39%<br>(+4%)              | 18%<br>(-22%)            |
| Vacation<br>(% Change 2004/2005)                                  | 59%<br>(+0%)              | 74%<br>(-6%)             | 63%<br>(+7%)                 | 71%<br>(+0%)             | 36%<br>(-21%)             | 26%<br>(-23%)                  | 48%<br>(-8%)             | 53%<br>N/A         | 61%<br>N/A        | 49%<br>(+0%)              | 52%<br>(-1%)              | 60%<br>(-8%)             |
| Adv. Trip Decision<br>(mean days)                                 | 89.6                      | 138.8                    | 101.2                        | 129.5                    | 48.9                      | 37.8                           | 51.6                     | 50.6               | 52.9              | 44.9                      | 43.4                      | 53.5                     |
| Adv. Air Decision (mean<br>days)                                  | 58.5                      | 105.2                    | 70.2                         | 73.0                     | 21.3                      | 25.2                           | 31.5                     | 35.1               | 33.1              | 19.9                      | 22.9                      | 30.3                     |
| Mean Travel Party Size  | 1.5                       | 1.7                      | 1.4                          | 1.7                      | 1.7                       | 1.3                            | 1.5                      | 1.5                | 1.5               | 1.5                       | 1.6                       | 1.7                      |
| Median Male Age<br>(years)  | 42                        | 43                       | 44                           | 44                       | 37                        | 35                             | 44                       | 44                 | 40                | 41                        | 40                        | 48                       |
| Median Female Age<br>(years)                                      | 40                        | 43                       | 41                           | 41                       | 33                        | 33                             | 39                       | 40                 | 40                | 35                        | 35                        | 37                       |
| Mean Household Income<br>(\$000)                                  | \$93                      | \$108                    | \$92                         | \$92                     | \$54                      | \$60                           | \$112                    | \$72               | \$103             | \$73                      | \$78                      | \$70                     |
| Nights CA (mean)<br>(median)<br>(Change in mean nts<br>2004/2005) | 10.6<br>6.0<br>(-0.5 nts) | 7.3<br>6.0<br>(-0.6 nts) | 14.4<br>7.0<br>(+1.3<br>nts) | 8.9<br>6.0<br>(+0.4 nts) | 15.0<br>6.0<br>(-1.1 nts) | 36.0<br>10.0<br>(+13.2<br>nts) | 6.8<br>4.0<br>(-1.4 nts) | 13.3<br>6.0<br>N/A | 9.7<br>7.0<br>N/A | 13.1<br>6.0<br>(-5.1 nts) | 11.5<br>6.0<br>(-0.3 nts) | 6.2<br>4.0<br>(-3.1 nts) |
| Hotel/Motel   | 79%                       | 89%                      | 79%                          | 78%                      | 71%                       | 53%                            | 87%                      | 87%                | 88%               | 69%                       | 64%                       | 76%                      |
| Private Home  | 30%                       | 23%                      | 36%                          | 30%                      | 28%                       | 51%                            | 16%                      | 19%                | 22%               | 37%                       | 44%                       | 33%                      |
| Rental Car  | 35%                       | 36%                      | 50%                          | 31%                      | 36%                       | 27%                            | 30%                      | 41%                | 35%               | 36%                       | 37%                       | 41%                      |
| Mean Total Trip Exp.<br>(Change in mean trip<br>exp 2004/2005)    | \$3,985<br>(+\$234)       | \$2,998<br>(-\$313)      | \$3,866<br>(-\$98)           | \$5,030<br>(+\$709)      | \$4,022<br>(+768\$)       | \$4,918<br>(+\$75)             | \$4,494<br>(+\$774)      | \$4,692<br>N/A     | \$4,592<br>N/A    | \$3,510<br>(+\$279)       | \$3,664<br>(+\$546)       | \$2,691<br>(+\$464)      |
| Est. State Spending<br>Impact                                     | \$5,231 Mil.              | \$591 Mil.               | \$360 Mil.                   | \$383 Mil.               | \$210 Mil.                | \$201 Mil.                     | \$864 Mil.               | \$44 Mil.          | \$83 Mil.         | \$333 Mil.                | \$264 Mil.                | \$538 Mil.               |

\*Does not include Canadian visitors. Only Mexican visitors arriving in the U.S. by air were included in the study.  
Source: ITA/OTTI, Survey of International Air Travelers, 2005, CIC Research, Inc.

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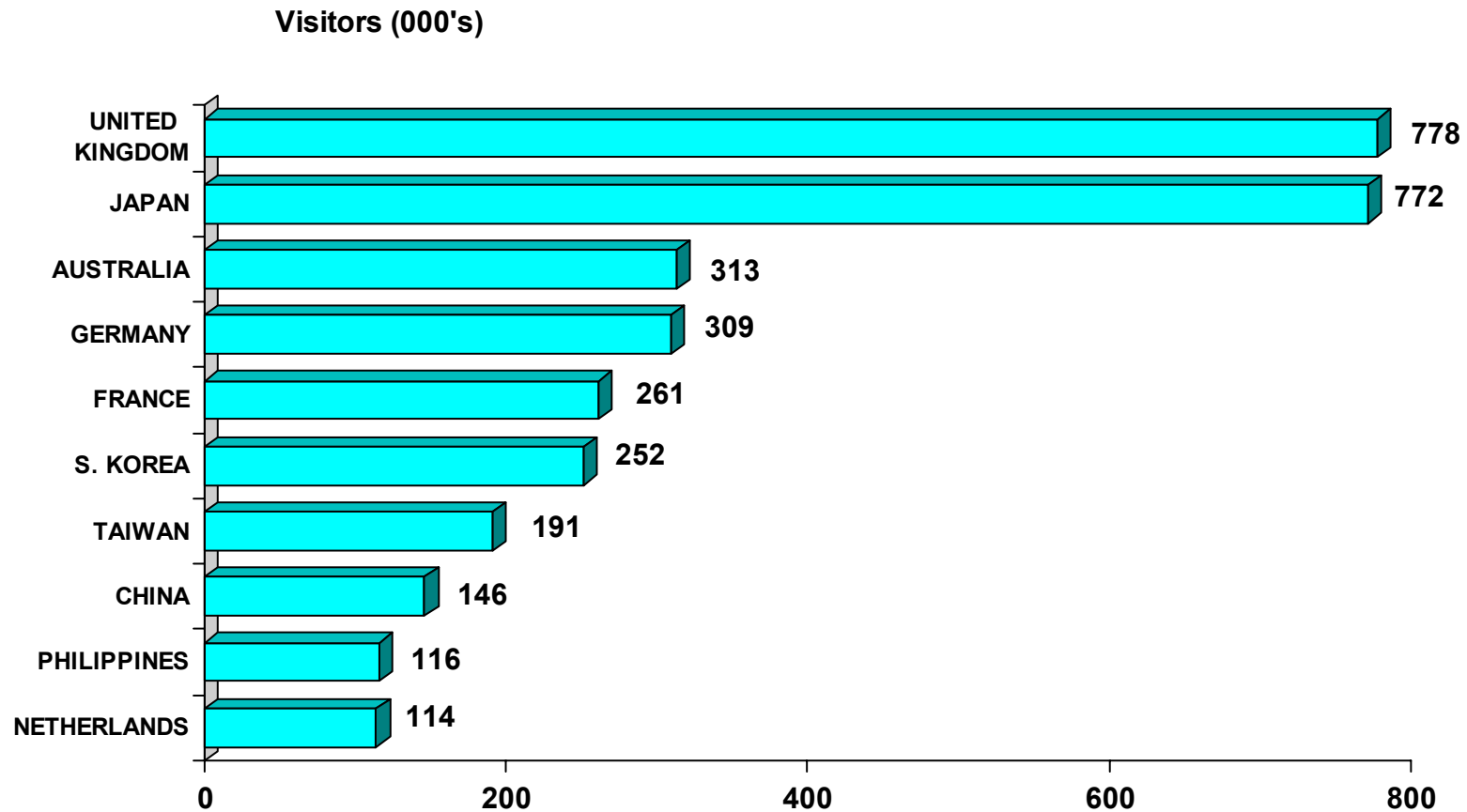
**OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA\***  
**SELECTED HIGHLIGHTS**  
**(2005)**

|                                   | All Overseas<br>Visitors | United<br>Kingdom | Germany | Australia<br>New Zealand | China<br>w/o HK | India   | Japan   | Malaysia | Singapore | South<br>Korea | Taiwan  | Mexico<br>(Air) |
|-----------------------------------|--------------------------|-------------------|---------|--------------------------|-----------------|---------|---------|----------|-----------|----------------|---------|-----------------|
| Estimated Travelers               | 2,930,000                | 630,000           | 186,000 | 287,000                  | 44,000          | 25,000  | 327,000 | 10,000   | 33,000    | 128,000        | 94,000  | 381,000         |
| Business                          | 5%                       | 2%                | 9%      | 5%                       | 4%              | 9%      | 3%      | 4%       | 6%        | 5%             | 4%      | 1%              |
| Vacation                          | 80%                      | 84%               | 86%     | 82%                      | 51%             | 61%     | 87%     | 84%      | 84%       | 71%            | 74%     | 72%             |
| Adv. Trip Decision<br>(mean days) | 114.9                    | 159.8             | 130.6   | 150.7                    | 67.4            | 56.6    | 65.0    | 80.6     | 67.1      | 59.6           | 50.1    | 59.0            |
| Adv. Air Decision (mean<br>days)  | 78.1                     | 124.6             | 87.9    | 86.4                     | 34.6            | 38.5    | 41.8    | 62.0     | 42.6      | 26.2           | 28.4    | 34.7            |
| Mean Travel Party Size            | 1.8                      | 1.9               | 1.6     | 1.9                      | 1.7             | 1.6     | 1.9     | 2.4      | 2.1       | 1.6            | 1.6     | 1.7             |
| Median Male Age<br>(years)        | 43                       | 46                | 49      | 42                       | 48              | 62      | 43      | 55       | 41        | 45             | 40      | 56              |
| Median Female Age<br>(years)      | 41                       | 44                | 41      | 42                       | 45              | 31      | 39      | 40       | 40        | 35             | 36      | 37              |
| Mean Household Income<br>(\$000)  | \$86                     | \$97              | \$78    | \$85                     | \$72            | \$61    | \$94    | \$73     | \$93      | \$71           | \$77    | \$58            |
| Nights CA (mean)                  | 11                       | 8                 | 12      | 9                        | 26              | 52      | 6       | 11       | 12        | 15             | 15      | 6               |
| (median)                          | 7                        | 7                 | 7       | 7                        | 10              | 17      | 4       | 11       | 8         | 7              | 8       | 6               |
| Hotel/Motel                       | 75%                      | 88%               | 76%     | 77%                      | 55%             | 23%     | 79%     | 89%      | 86%       | 47%            | 46%     | 67%             |
| Private Home                      | 36%                      | 24%               | 43%     | 31%                      | 56%             | 84%     | 26%     | 24%      | 33%       | 59%            | 66%     | 42%             |
| Rental Car                        | 34%                      | 35%               | 45%     | 29%                      | 49%             | 19%     | 27%     | 51%      | 39%       | 24%            | 30%     | 42%             |
| Mean Total Trip<br>Expenditure    | \$3,350                  | \$2,753           | \$3,169 | \$4,609                  | \$3,054         | \$2,095 | \$2,984 | \$3,267  | \$3,434   | \$3,002        | \$3,516 | \$2,920         |

\*Does not include Canadian visitors. Only Mexican visitors arriving in the U.S. by air were included in the study.

Source: ITA/OTTI, Survey of International Air Travelers, 2005  
CIC Research, Inc.

Figure 1  
**TOP TEN COUNTRIES OF RESIDENCE**  
OVERSEAS VISITORS TO CALIFORNIA  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

**Table 1**  
**RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA**  
**(2005)**

| Residence of Visitors | UNITED STATES                      |  | CALIFORNIA   |                                   |  |
|-----------------------|------------------------------------|--|--|-----------------------------------|--|
|                       | Num. Of<br>Visitors<br>To The U.S. | Percent Of<br>Total U.S.<br>Overseas<br>Visitors | Estimated<br>Overseas<br>Visitors To<br>California | Percent Of<br>California<br>Total | CA Share Of<br>Visitors From<br>This Country |
| <b>EUROPE</b>         | <b>10,312,636</b>                  | <b>47.6%</b>                                     | <b>2,063,000</b>                                   | <b>43.1%</b>                      | <b>20.0%</b>                                 |
| W. EUROPE             | 9,879,934                          | 45.6%  | 1,986,000  | 41.5%                             | 20.1%  |
| Austria               | 117,688                            | 0.5%   | 24,000   | 0.5%                              | 20.1%  |
| Belgium               | 191,596                            | 0.9%   | 34,000   | 0.7%                              | 17.7%  |
| Denmark               | 174,581                            | 0.8%   | 18,000   | 0.4%                              | 10.2%  |
| France                | 878,648                            | 4.1%   | 261,000  | 5.4%                              | 29.7%  |
| Germany               | 1,415,530                          | 6.5%   | 309,000  | 6.4%                              | 21.8%  |
| Ireland               | 383,400                            | 1.8%   | 100,000  | 2.1%                              | 26.2%  |
| Italy                 | 545,546                            | 2.5%   | 106,000  | 2.2%                              | 19.5%  |
| Netherlands           | 448,650                            | 2.1%   | 114,000  | 2.4%                              | 25.3%  |
| Norway                | 139,043                            | 0.6%   | 35,000   | 0.7%                              | 25.0%  |
| Spain                 | 385,640                            | 1.8%   | 43,000   | 0.9%                              | 11.2%  |
| Sweden                | 290,530                            | 1.3%   | 53,000   | 1.1%                              | 18.1%  |
| Switzerland           | 256,730                            | 1.2%   | 53,000   | 1.1%                              | 20.6%  |
| United Kingdom        | 4,344,957                          | 20.0%  | 778,000  | 16.2%                             | 17.9%  |
| Other Western Europe  | 307,395                            | 1.4%   | 58,000   | 1.2%                              | 18.9%  |
| E. EUROPE             | 432,702                            | 2.0%   | 64,000   | 1.3%                              | 14.9%  |
| <b>CARIBBEAN</b>      | <b>1,134,886</b>                   | <b>5.2%</b>                                      | <b>33,000</b>                                      | <b>0.7%</b>                       | <b>2.9%</b>                                  |
| Bahamas               | 237,140                            | 1.1%   | --   | --                                | --   |
| Dominican Rep         | 221,449                            | 1.0%   | 9,000  | 0.2%                              | 3.9%   |
| Jamaica               | 175,351                            | 0.8%   | --   | --                                | --   |
| Trinidad & Tobago     | 128,392                            | 0.6%   | 3,000  | 0.1%                              | 2.0%   |
| Other Caribbean       | 372,554                            | 1.7%   | 21,000   | 0.4%                              | 5.6%   |

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

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Table 1  
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)  
(2005)

| Residence of Visitors                   | UNITED STATES                      |                                      | CALIFORNIA                             |                                   |  |
|---|------------------------------------|--------------------------------------|--|-----------------------------------|--|
|   | Num. Of<br>Visitors<br>To The U.S. | Percent Of<br>Total U.S.<br>Visitors | Number Of<br>Visitors<br>To California | Percent Of<br>California<br>Total | CA Share Of<br>Visitors From<br>This Country |
| <b>SOUTH AMERICA</b>                    | <b>1,820,315</b>                   | <b>8.4%</b>                          | <b>160,000</b>                         | <b>3.3%</b>                       | <b>8.8%</b>                                  |
| Argentina                               | 188,865                            | 0.9%                                 | 9,000                                  | 0.2%                              | 4.7%   |
| Brazil                                  | 485,373                            | 2.2%                                 | 51,000                                 | 1.1%                              | 10.5%  |
| Chile                                   | 101,550                            | 0.5%                                 | 6,000                                  | 0.1%                              | 6.4%   |
| Colombia                                | 325,398                            | 1.5%                                 | 8,000                                  | 0.2%                              | 2.5%   |
| Ecuador                                 | 143,073                            | 0.7%                                 | 48,000                                 | 1.0%                              | 33.6%  |
| Peru                                    | 151,823                            | 0.7%                                 | 16,000                                 | 0.3%                              | 10.6%  |
| Venezuela                               | 340,315                            | 1.6%                                 | 13,000                                 | 0.3%                              | 3.9%   |
| Other South America                     | 83,918                             | 0.4%                                 | 9,000                                  | 0.2%                              | 10.7%  |
| <b>CENTRAL AMERICA (Excl'd. Mexico)</b> | <b>696,207</b>                     | <b>3.2%</b>                          | <b>140,000</b>                         | <b>2.9%</b>                       | <b>20.1%</b>                                 |
| Costa Rica                              | 133,820                            | 0.6%                                 | 23,000                                 | 0.5%                              | 17.5%  |
| Guatemala                               | 170,076                            | 0.8%                                 | 39,000                                 | 0.8%                              | 22.7%  |
| Honduras                                | 89,718                             | 0.4%                                 | --                                     | --                                | --   |
| Panama                                  | 78,855                             | 0.4%                                 | 29,000                                 | 0.6%                              | 36.4%  |
| Other Central America                   | 223,738                            | 1.0%                                 | 49,000                                 | 1.0%                              | 21.9%  |
| Mexico (Air Arrivals Only)              | 1,668,432                          | 7.1%                                 | 496,000                                | 9.4%                              | 29.7%  |
| <b>AFRICA</b>                           | <b>252,196</b>                     | <b>1.2%</b>                          | <b>26,000</b>                          | <b>0.5%</b>                       | <b>10.4%</b>                                 |
| South Africa, Rep. of                   | 89,102                             | 0.4%                                 | 15,000                                 | 0.3%                              | 16.5%  |
| Other Africa                            | 163,094                            | 0.8%                                 | 11,000                                 | 0.2%                              | 6.7%   |
| <b>OCEANIA</b>                          | <b>736,835</b>                     | <b>3.4%</b>                          | <b>411,000</b>                         | <b>8.6%</b>                       | <b>55.8%</b>                                 |
| Australia                               | 581,773                            | 2.7%                                 | 313,000                                | 6.5%                              | 53.8%  |
| New Zealand                             | 139,780                            | 0.6%                                 | 89,000                                 | 1.9%                              | 63.5%  |
| Other Oceania                           | 15,282                             | 0.1%                                 | 9,000                                  | 0.2%                              | 58.9%  |

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

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**Table 1**  
**RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)**  
**(2005)**

| Residence of Visitors                                     | UNITED STATES                      |                                      | CALIFORNIA                             |                                   |  |
|---|------------------------------------|--------------------------------------|--|-----------------------------------|--|
|   | Num. Of<br>Visitors<br>To The U.S. | Percent Of<br>Total U.S.<br>Visitors | Number Of<br>Visitors<br>To California | Percent Of<br>California<br>Total | CA Share Of<br>Visitors From<br>This Country |
| <b>FAR EAST</b>   | <b>6,198,077</b>                   | <b>28.6%</b>                         | <b>1,754,000</b>                       | <b>36.6%</b>                      | <b>28.3%</b>                                 |
| Hong Kong   | 135,108                            | 0.6%                                 | 81,000                                 | 1.7%                              | 59.8%  |
| India   | 344,926                            | 1.6%                                 | 98,000                                 | 2.0%                              | 28.4%  |
| Indonesia   | 51,566                             | 0.2%                                 | 33,000                                 | 0.7%                              | 63.6%  |
| Japan   | 3,883,906                          | 17.9%                                | 722,000                                | 15.1%                             | 18.6%  |
| Korea, South  | 705,093                            | 3.3%                                 | 252,000                                | 5.3%                              | 35.8%  |
| People's Republic of China                                | 270,272                            | 1.2%                                 | 146,000                                | 3.0%                              | 54.2%  |
| Philippines   | 153,821                            | 0.7%                                 | 116,000                                | 2.4%                              | 75.4%  |
| Republic of China   | 318,886                            | 1.5%                                 | 191,000                                | 4.0%                              | 59.8%  |
| Singapore   | 115,939                            | 0.5%                                 | 65,000                                 | 1.4%                              | 56.4%  |
| Thailand  | 66,833                             | 0.3%                                 | 34,000                                 | 0.7%                              | 50.6%  |
| Other Far East  | 151,727                            | 0.7%                                 | 16,000                                 | 0.3%                              | 10.5%  |
| <b>MIDDLE EAST</b>  | <b>527,344</b>                     | <b>2.4%</b>                          | <b>76,000</b>                          | <b>1.6%</b>                       | <b>14.4%</b>                                 |
| Egypt   | 24,048                             | 0.1%                                 | --                                     | --                                | --   |
| Israel  | 284,310                            | 1.3%                                 | 45,000                                 | 0.9%                              | 16.0%  |
| Saudi Arabia  | 25,119                             | 0.1%                                 | 6,000                                  | 0.1%                              | 24.7%  |
| Turkey  | 84,434                             | 0.4%                                 | 6,000                                  | 0.1%                              | 7.4%   |
| Other Middle East   | 109,433                            | 0.5%                                 | 19,000                                 | 0.4%                              | 17.4%  |
| <b>TOTAL OVERSEAS VISITORS</b><br>(Number of Respondents) | <b>21,678,496</b><br>(25,305)      | <b>100.0%</b>                        | <b>4,791,000</b><br>(7,179)            | <b>100.0%</b>                     | <b>22.1%</b>                                 |

Note: -- Represents one of the following: Fewer than 500 respondents in the column, or a response of less than 0.05%.

\* Countries and World Region visitor volumes are independently estimated and may not sum to total visitors.

Source: ITA Survey of International Air Travelers, 2005.

CIC Research, Inc.

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**Table 2**  
**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA**  
**SHARE OF TOTAL U.S. MARKET BY COUNTRY**  
**AND VISITOR VOLUME ESTIMATE**  
**(1994 - 2005)**

**California's Share of Overseas & Mexican (Air) Visitors to the U.S.**

| <b>Share</b> | <b>All Overseas</b> | <b>All Europe</b> | <b>Germany</b> | <b>United Kingdom</b> | <b>France</b> | <b>Italy</b> | <b>Netherlands</b> | <b>Ireland</b> | <b>Other Europe</b> | <b>Mexico (air)</b> |
|--------------|---------------------|-------------------|----------------|-----------------------|---------------|--------------|--------------------|----------------|---------------------|---------------------|
| 1994         | 27.0%               | 27.0%             | 29.5%          | 23.6%                 | 26.6%         | 28.4%        | 32.5%              | 28.6%          | 37.3%               | 31.5%               |
| 1995         | 25.7%               | 26.5%             | 30.7%          | 20.5%                 | 27.8%         | 30.2%        | 37.8%              | 19.3%          | 36.8%               | 28.8%               |
| 1996         | 26.5%               | 26.6%             | 28.6%          | 21.2%                 | 29.8%         | 30.2%        | 39.8%              | 21.4%          | 37.7%               | 25.3%               |
| 1997         | 26.6%               | 26.0%             | 26.7%          | 21.9%                 | 29.5%         | 33.0%        | 27.1%              | 35.1%          | 36.0%               | 23.3%               |
| 1998         | 25.2%               | 24.8%             | 26.5%          | 21.2%                 | 34.3%         | 31.7%        | 27.4%              | 22.8%          | 30.9%               | 26.8%               |
| 1999         | 25.5%               | 24.1%             | 26.4%          | 19.2%                 | 33.6%         | 30.3%        | 29.3%              | 25.2%          | 32.3%               | 22.0%               |
| 2000         | 24.5%               | 21.0%             | 22.1%          | 16.3%                 | 30.4%         | 27.2%        | 25.1%              | 32.3%          | 30.2%               | 26.0%               |
| 2001         | 22.2%               | 18.2%             | 20.6%          | 15.4%                 | 24.5%         | 24.9%        | 19.6%              | 15.3%          | 24.1%               | 30.6%               |
| 2002         | 21.2%               | 19.2%             | 19.8%          | 17.3%                 | 25.9%         | 22.8%        | 22.1%              | 21.8%          | 26.1%               | 27.3%               |
| 2003         | 22.1%               | 20.3%             | 20.2%          | 17.6%                 | 28.5%         | 18.3%        | 25.2%              | 23.9%          | 30.7%               | 32.3%               |
| 2004         | 20.7%               | 18.0%             | 20.8%          | 16.1%                 | 27.7%         | 24.5%        | 27.0%              | 11.1%          | 21.7%               | 27.4%               |
| 2005         | 22.1%               | 20.0%             | 21.8%          | 17.9%                 | 29.7%         | 19.5%        | 25.2%              | 26.2%          | 26.5%               | 29.7%               |

**Estimated Volume of Visitors to California**

| <b>Estimates</b> | <b>All Overseas</b> | <b>All Europe</b> | <b>Germany</b> | <b>United Kingdom</b> | <b>France</b> | <b>Italy</b> | <b>Netherlands</b> | <b>Ireland</b> | <b>Other Europe</b> | <b>Mexico (air)</b> |
|------------------|---------------------|-------------------|----------------|-----------------------|---------------|--------------|--------------------|----------------|---------------------|---------------------|
| 1994             | 4,984,000           | 2,192,000         | 479,000        | 654,000               | 219,000       | 150,000      | 121,000            | 43,000         | 690,000             | 451,000             |
| 1995             | 5,304,000           | 2,330,000         | 567,000        | 592,000               | 256,000       | 159,000      | 154,000            | 29,000         | 756,000             | 256,000             |
| 1996             | 6,004,000           | 2,588,000         | 571,000        | 688,000               | 294,000       | 159,000      | 175,000            | 44,000         | 876,000             | 276,000             |
| 1997             | 6,436,000           | 2,701,000         | 532,000        | 815,000               | 289,000       | 191,000      | 128,000            | 76,000         | 874,000             | 304,000             |
| 1998             | 5,972,000           | 2,647,000         | 504,000        | 843,000               | 348,000       | 194,000      | 134,000            | 53,000         | 758,000             | 381,000             |
| 1999             | 6,239,000           | 2,709,000         | 524,000        | 816,000               | 356,000       | 190,000      | 154,000            | 62,000         | 823,000             | 328,000             |
| 2000             | 6,364,000           | 2,435,000         | 395,000        | 767,000               | 330,000       | 167,000      | 139,000            | 92,000         | 776,000             | 452,000             |
| 2001             | 4,847,000           | 1,728,000         | 271,000        | 631,000               | 215,000       | 118,000      | 81,000             | 42,000         | 493,000             | 463,000             |
| 2002             | 4,053,000           | 1,652,000         | 236,000        | 660,000               | 190,000       | 93,000       | 85,000             | 57,000         | 473,000             | 392,000             |
| 2003             | 3,984,000           | 1,754,000         | 238,000        | 693,000               | 196,000       | 75,000       | 94,000             | 61,000         | 552,000             | 439,000             |
| 2004             | 4,207,000           | 1,743,000         | 275,000        | 693,000               | 215,000       | 115,000      | 115,000            | 38,000         | 445,000             | 409,000             |
| 2005             | 4,791,000           | 2,063,000         | 309,000        | 778,000               | 261,000       | 106,000      | 113,000            | 100,000        | 609,000             | 496,000             |

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**Table 2 - (Continued)**  
**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA**  
**SHARE OF TOTAL U.S. MARKET BY COUNTRY**  
**AND VISITOR VOLUME ESTIMATE**  
**(1994 - 2005)**

**California's Share of Overseas Visitors to the U.S. From Asia, Australia, and South America**

| <b>Share</b> | <b>Asia</b> | <b>Japan</b> | <b>South Korea</b> | <b>Hong Kong</b> | <b>Taiwan</b> | <b>India</b> | <b>China</b> | <b>Other Far East</b> | <b>Australia</b> | <b>South America</b> |
|--------------|-------------|--------------|--------------------|------------------|---------------|--------------|--------------|-----------------------|------------------|----------------------|
| 1994         | 31.6%       | 20.3%        | 48.8%              | 58.2%            | 66.2%         | 39.1%        | N/A          | 80.1%                 | 63.2%            | 13.5%                |
| 1995         | 30.0%       | 20.4%        | 39.9%              | 57.8%            | 61.7%         | 38.5%        | N/A          | 75.8%                 | 62.2%            | 10.5%                |
| 1996         | 31.3%       | 22.5%        | 32.9%              | 58.0%            | 64.8%         | 45.8%        | N/A          | 80.6%                 | 59.1%            | 13.7%                |
| 1997         | 32.1%       | 23.4%        | 39.0%              | 60.0%            | 65.3%         | 35.7%        | N/A          | 77.3%                 | 57.2%            | 15.1%                |
| 1998         | 31.6%       | 23.0%        | 52.0%              | 54.5%            | 66.2%         | 42.2%        | N/A          | 77.4%                 | 58.5%            | 15.1%                |
| 1999         | 31.9%       | 22.4%        | 61.5%              | 58.7%            | 60.0%         | 38.1%        | N/A          | 64.6%                 | 58.6%            | 13.2%                |
| 2000         | 33.2%       | 21.8%        | 63.3%              | 62.1%            | 59.6%         | 40.2%        | 59.6%        | 51.7%                 | 60.7%            | 11.6%                |
| 2001         | 32.5%       | 20.8%        | 46.3%              | 60.8%            | 65.0%         | 44.0%        | 67.9%        | 52.1%                 | 52.1%            | 11.5%                |
| 2002         | 29.1%       | 18.0%        | 44.7%              | 54.9%            | 63.9%         | 34.0%        | 53.0%        | 48.9%                 | 49.0%            | 10.2%                |
| 2003         | 30.5%       | 18.6%        | 49.0%              | 56.3%            | 63.3%         | 40.0%        | 44.9%        | 54.9%                 | 49.4%            | 9.7%                 |
| 2004         | 27.7%       | 16.8%        | 43.5%              | 46.3%            | 59.6%         | 34.7%        | 49.8%        | 52.9%                 | 49.8%            | 11.0%                |
| 2005         | 28.3%       | 18.6%        | 35.8%              | 59.8%            | 59.8%         | 28.4%        | 54.2%        | 48.9%                 | 53.8%            | 8.8%                 |

**Estimated Volume of Visitors to California**

| <b>Estimates</b> | <b>Asia</b> | <b>Japan</b> | <b>South Korea</b> | <b>Hong Kong</b> | <b>Taiwan</b> | <b>India</b> | <b>China</b> | <b>Other Far East</b> | <b>Australia</b> | <b>South America</b> |
|------------------|-------------|--------------|--------------------|------------------|---------------|--------------|--------------|-----------------------|------------------|----------------------|
| 1994             | 1,754,000   | 772,000      | 243,000            | 113,000          | 251,000       | 41,000       | N/A          | 334,000               | 257,000          | 285,000              |
| 1995             | 1,985,000   | 938,000      | 236,000            | 127,000          | 255,000       | 48,000       | N/A          | 381,000               | 263,000          | 257,000              |
| 1996             | 2,348,000   | 1,166,000    | 247,000            | 141,000          | 269,000       | 66,000       | N/A          | 459,000               | 274,000          | 337,000              |
| 1997             | 2,490,000   | 1,256,000    | 291,000            | 133,000          | 289,000       | 62,000       | N/A          | 459,000               | 286,000          | 427,000              |
| 1998             | 2,125,000   | 1,124,000    | 189,000            | 116,000          | 256,000       | 89,000       | N/A          | 351,000               | 270,000          | 447,000              |
| 1999             | 2,212,000   | 1,081,000    | 307,000            | 113,000          | 272,000       | 87,000       | N/A          | 352,000               | 283,000          | 361,000              |
| 2000             | 2,508,000   | 1,103,000    | 419,000            | 126,000          | 273,000       | 110,000      | 106,000      | 371,000               | 328,000          | 341,000              |
| 2001             | 2,053,000   | 849,000      | 286,000            | 104,000          | 232,000       | 119,000      | 158,000      | 305,000               | 222,000          | 291,000              |
| 2002             | 1,656,000   | 653,000      | 285,000            | 74,000           | 184,000       | 87,000       | 120,000      | 253,000               | 199,000          | 185,000              |
| 2003             | 1,526,000   | 590,000      | 303,000            | 64,000           | 151,000       | 109,000      | 71,000       | 238,000               | 200,000          | 148,000              |
| 2004             | 1,607,000   | 630,000      | 273,000            | 57,000           | 177,000       | 107,000      | 101,000      | 262,000               | 259,000          | 181,000              |
| 2005             | 1,754,000   | 722,000      | 252,000            | 81,000           | 191,000       | 98,000       | 146,000      | 264,000               | 313,000          | 160,000              |

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## INTRODUCTION

This report on overseas visitors to California is based on data compiled from the 2005 Office of Travel & Tourism Industries (OTTI) "Survey of International Air Travelers." The survey is conducted by CIC Research, Inc. in cooperation with over 60 major airlines on a sample of their international flights departing from U.S. airports. The survey information is collected from passengers through questionnaires covering traveler demographics, trip activities, places visited and travel expenditures. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used by the public and private sectors to guide strategic planning and marketing to international air travelers.

Approximately 7,200 survey respondents reported a California visit in 2005. This is a very robust sample size, providing a unique opportunity to evaluate the characteristics of the international visitor market. However, since airline participation is voluntary and varies from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data may not fully represent the market's international travel to California.

With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the U.S. Department of Homeland Security. Passengers on most charter flights and passengers traveling by air between the U.S. and Canada are excluded. Travelers to the U.S. from Mexico arriving on an international flight have been included in the 2005 report. However, most travelers from Mexico to California arrive in the U.S. through a land port of entry. A more detailed explanation of the survey methodology appears in Appendix A and a copy of the survey questionnaire in Appendix B.

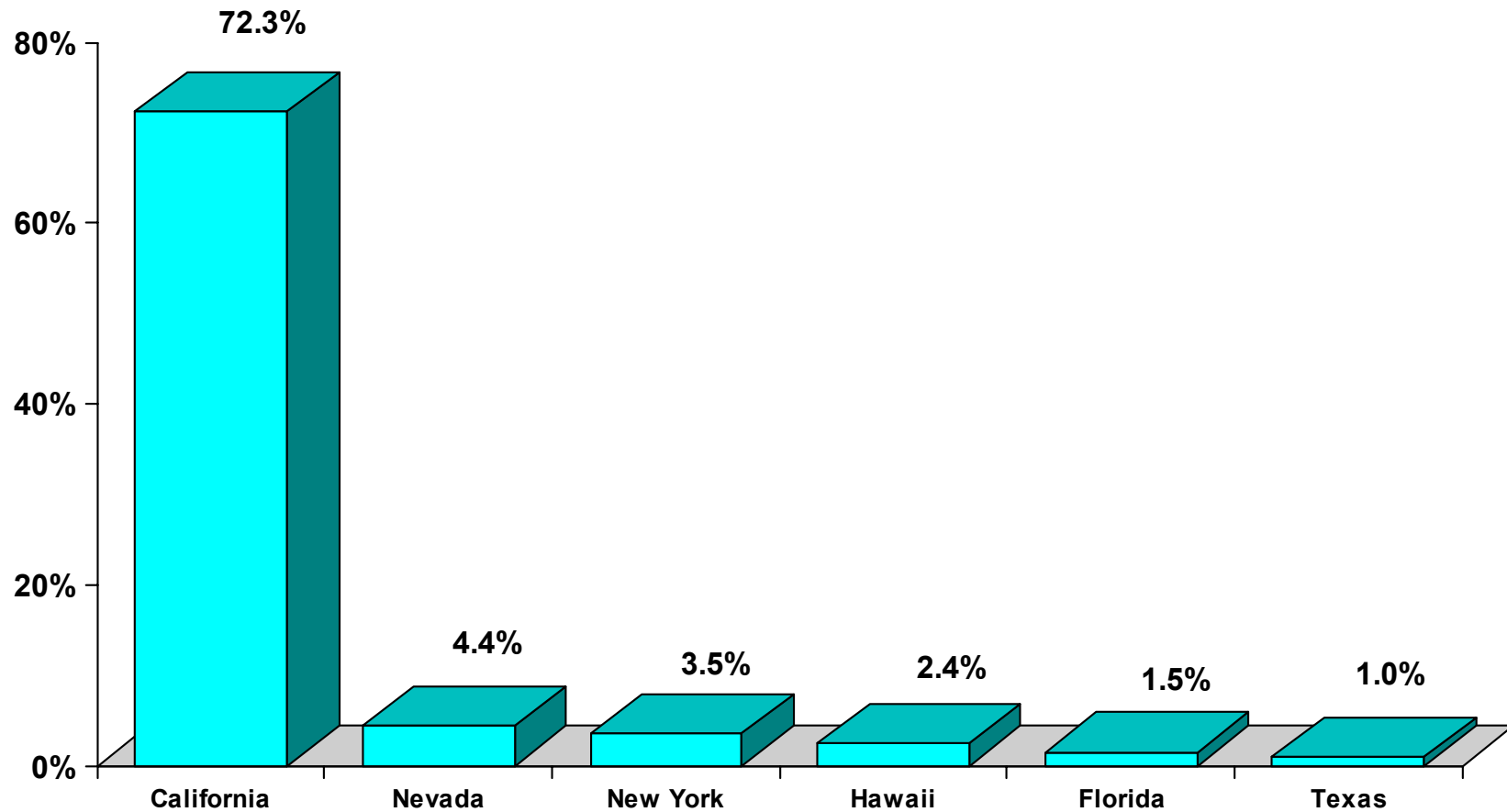
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**OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

Figure 2  
**MAIN STATE DESTINATION**  
OVERSEAS VISITORS TO CALIFORNIA  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 3

**MAIN DESTINATION BY STATE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

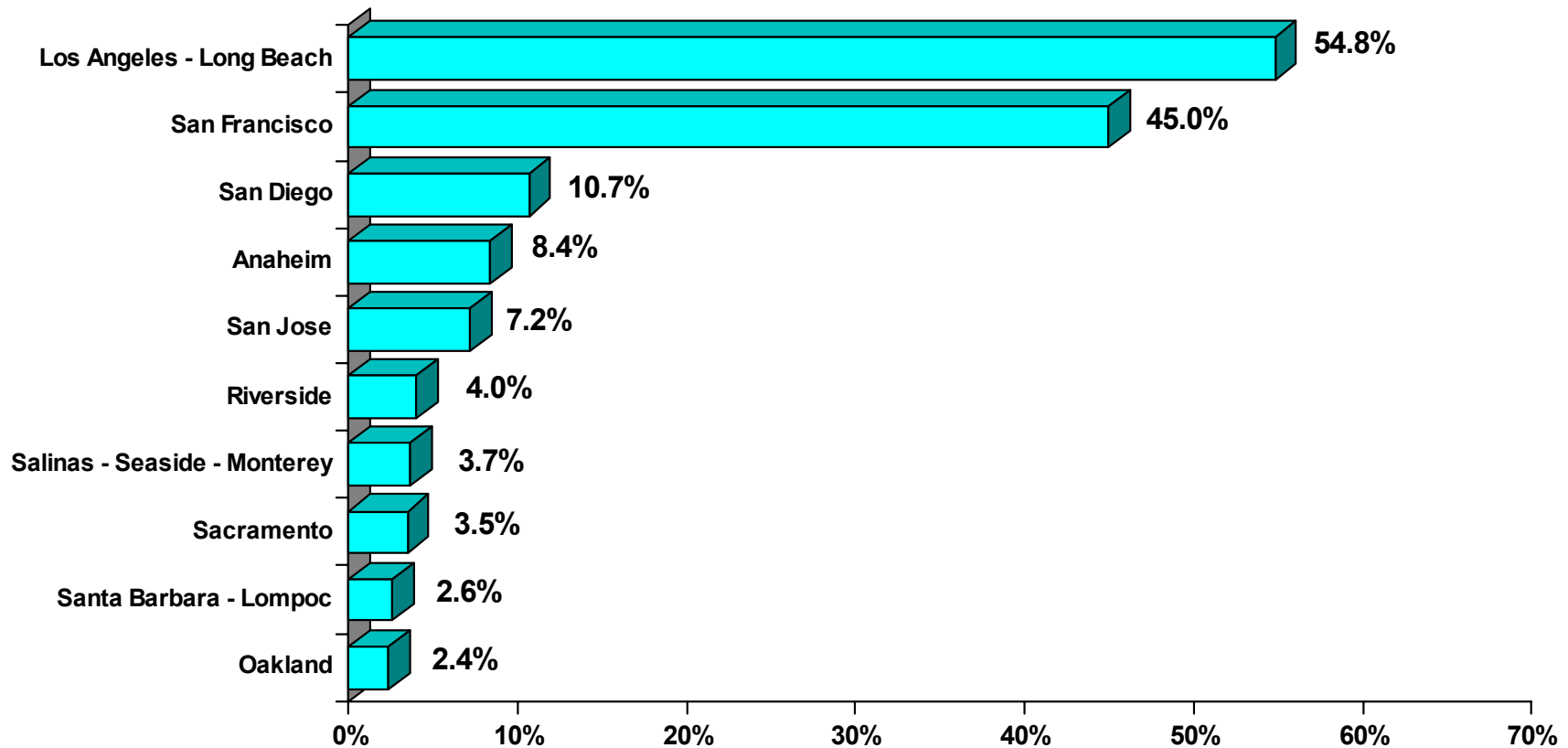
- Almost three in four (72%) overseas visitors to California indicated that California was their main destination on their U.S. trip.
- Of all overseas visitors to California, Mexico (air) visitors (90%) followed by Taiwanese (81%), Japanese (80%), and Indian visitors (79%), reported the highest proportion with California as their main state of destination in the U.S.

| MAIN DESTINATION*       | COUNTRY OF RESIDENCE OF VISITORS |              |              |                              |                 |              |              |              |              |                |              |                 |
|-------------------------|----------------------------------|--------------|--------------|------------------------------|-----------------|--------------|--------------|--------------|--------------|----------------|--------------|-----------------|
|                         | TOTAL<br>OVERSEAS                | U.K.         | GERMANY      | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA        | JAPAN        | MALAYSIA     | SINGAPORE    | SOUTH<br>KOREA | TAIWAN       | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000      | 309,000      | 402,000                      | 146,000         | 98,000       | 722,000      | 28,000       | 65,000       | 252,000        | 191,000      | 496,000         |
| (Number of Respondents) | (5,280)                          | (571)        | (183)        | (840)                        | (131)           | (141)        | (1,344)      | (155)        | (160)        | (186)          | (669)        | (175)           |
| <b>California</b>       | <b>72.3%</b>                     | <b>72.5%</b> | <b>76.3%</b> | <b>47.5%</b>                 | <b>75.1%</b>    | <b>78.5%</b> | <b>79.5%</b> | <b>74.4%</b> | <b>71.6%</b> | <b>73.6%</b>   | <b>80.9%</b> | <b>89.5%</b>    |
| Nevada                  | 4.4                              | 6.7          | 1.3          | 2.6                          | 2.5             | 2.9          | 4.3          | 1.7          | 2.1          | 1.3            | 1.5          | 0.9             |
| New York                | 3.5                              | 2.3          | 0.9          | 10.7                         | 2.2             | 1.1          | 2.2          | 1.7          | 5.2          | 8.8            | 1.5          | -               |
| Hawaiian Islands        | 2.4                              | 5.6          | 6.1          | 1.6                          | -               | -            | 1.6          | 0.3          | -            | 1.2            | 1.2          | 2.0             |
| Florida                 | 1.5                              | 1.3          | 1.3          | 3.1                          | 0.4             | 1.0          | 0.8          | 4.2          | 0.9          | -              | 0.1          | 0.1             |
| Texas                   | 1.0                              | -            | 0.9          | 0.8                          | 3.4             | -            | 0.6          | 2.4          | 0.4          | 2.5            | 2.7          | -               |
| Washington              | 1.0                              | 0.1          | 0.3          | 1.2                          | 1.1             | 2.0          | 0.7          | 1.1          | 0.7          | 3.4            | 1.5          | -               |

\*Visitors may report only one destination -- States with less than 1% response were not listed.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 3**  
**TOP TEN MSA DESTINATIONS**  
OVERSEAS VISITORS TO CALIFORNIA  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 4

**CALIFORNIA MSAs VISITED  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA\*  
(2005)**

- The most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California were Los Angeles – Long Beach (55%), San Francisco (45%), San Diego (11%), Anaheim – Santa Ana (8%), and San Jose (7%).

| METROPOLITAN STATISTICAL<br>AREA*                                       | TOTAL<br>OVERSEAS    | COUNTRY OF RESIDENCE OF VISITORS |                  |                              |                  |                 |                    |                 |                 |                  |                  | MEXICO<br>(AIR)  |
|---|----------------------|----------------------------------|------------------|------------------------------|------------------|-----------------|--------------------|-----------------|-----------------|------------------|------------------|------------------|
|   |                      | U.K.                             | GERMANY          | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK  | INDIA           | JAPAN              | MALAYSIA        | SINGAPORE       | SOUTH<br>KOREA   | TAIWAN           |                  |
| ESTIMATED TRAVELERS<br>(Number of Respondents)                          | 4,791,000<br>(7,063) | 778,000<br>(728)                 | 309,000<br>(231) | 402,000<br>(1,210)           | 146,000<br>(202) | 98,000<br>(176) | 722,000<br>(1,665) | 28,000<br>(216) | 65,000<br>(236) | 252,000<br>(262) | 191,000<br>(958) | 496,000<br>(186) |
| <b>Los Angeles-Long Beach MSA</b><br>(Los Angeles County)               | 2,625,000<br>54.8%   | 366,000<br>47.0%                 | 146,000<br>47.1% | 268,000<br>66.7%             | 83,000<br>57.1%  | 39,000<br>40.0% | 352,000<br>48.8%   | 20,000<br>71.2% | 37,000<br>56.2% | 139,000<br>55.1% | 122,000<br>63.8% | 241,000<br>48.5% |
| Universal Studios   | 24,000<br>0.5%       | 4,000<br>0.5%                    | 1,000<br>0.2%    | 4,000<br>0.9%                | -<br>-           | -<br>-          | 8,000<br>1.1%      | 1,000<br>2.3%   | 1,000<br>1.2%   | -<br>-           | 2,000<br>1.1%    | -<br>-           |
| Hollywood   | 38,000<br>0.8%       | 8,000<br>1.0%                    | 1,000<br>0.2%    | 7,000<br>1.7%                | <1,000<br>0.2%   | <1,000<br>0.2%  | 7,000<br>1.0%      | <1,000<br>0.9%  | <1,000<br>0.5%  | -<br>-           | 1,000<br>0.6%    | -<br>-           |
| <b>San Francisco MSA</b><br>(San Francisco-Marin-San Mateo<br>Counties) | 2,156,000<br>45.0%   | 416,000<br>53.5%                 | 169,000<br>54.7% | 133,000<br>33.1%             | 70,000<br>48.2%  | 35,000<br>35.9% | 268,000<br>37.1%   | 9,000<br>31.6%  | 35,000<br>53.8% | 100,000<br>39.7% | 62,000<br>32.5%  | 175,000<br>35.2% |
| <b>San Diego MSA</b><br>(San Diego County)                              | 513,000<br>10.7%     | 75,000<br>9.7%                   | 60,000<br>19.4%  | 47,000<br>11.6%              | 9,000<br>6.3%    | 12,000<br>12.4% | 81,000<br>11.2%    | 3,000<br>10.2%  | 7,000<br>10.8%  | 16,000<br>6.3%   | 13,000<br>6.8%   | 62,000<br>12.5%  |
| Sea World   | 5,000<br>0.1%        | -<br>-                           | -<br>-           | 1,000<br>0.3%                | -<br>-           | -<br>-          | 1,000<br>0.1%      | 1,000<br>2.7%   | <1,000<br>0.5%  | -<br>-           | 1,000<br>0.4%    | -<br>-           |
| <b>Anaheim-Santa Ana MSA</b><br>(Orange County)                         | 402,000<br>8.4%      | 69,000<br>8.9%                   | 14,000<br>4.6%   | 86,000<br>21.5%              | 2,000<br>1.5%    | 3,000<br>3.2%   | 87,000<br>12.1%    | 3,000<br>11.3%  | 12,000<br>17.7% | 13,000<br>5.3%   | 15,000<br>7.6%   | 40,000<br>8.1%   |
| Disneyland  | 96,000<br>2.0%       | 19,000<br>2.4%                   | -<br>-           | 14,000<br>3.6%               | <1,000<br>0.2%   | 1,000<br>0.7%   | 20,000<br>2.8%     | 2,000<br>7.0%   | 4,000<br>6.8%   | 2,000<br>0.7%    | 5,000<br>2.4%    | 30,000<br>6.0%   |

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Table 4 (continued)  
COUNTRY OF RESIDENCE OF VISITORS

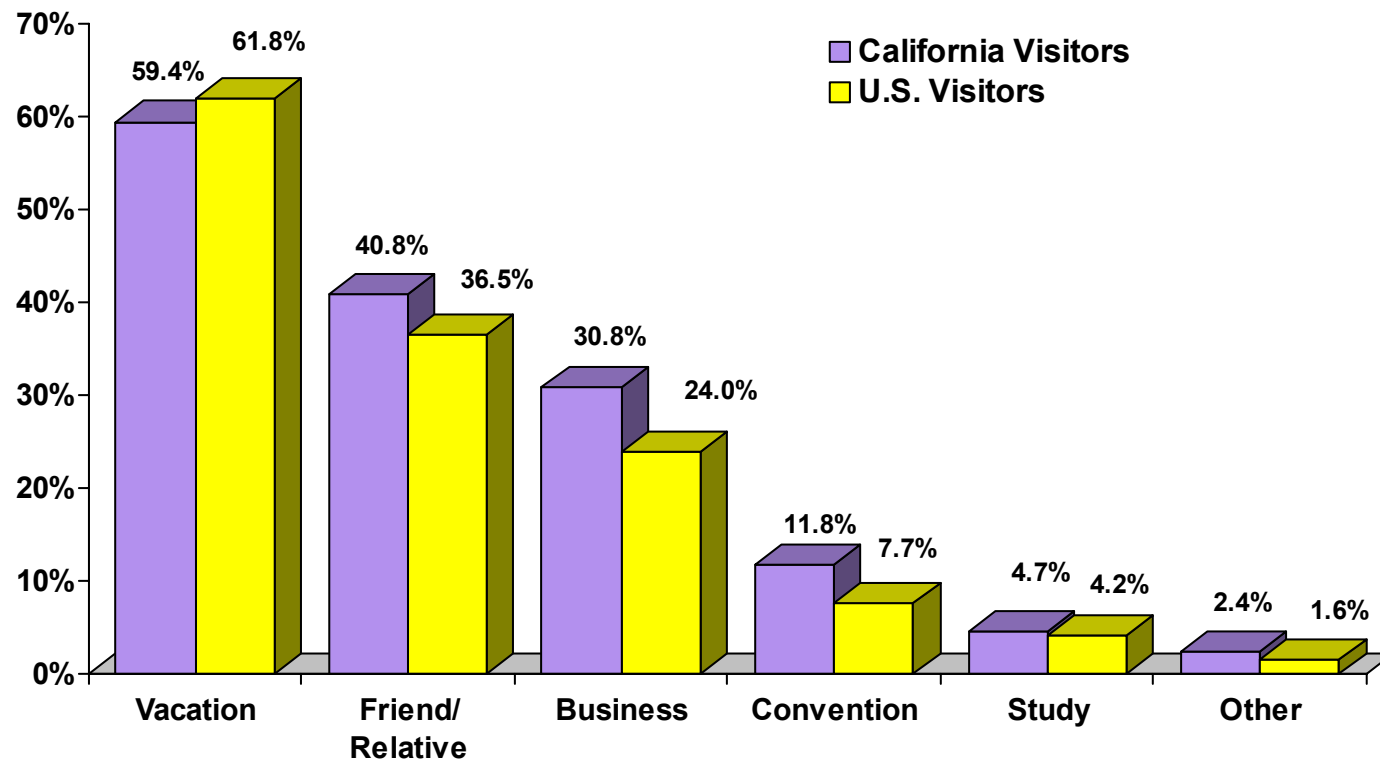
| METROPOLITAN STATISTICAL<br>AREA*   | TOTAL<br>OVERSEAS    | U.K.             | GERMANY          | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK  | INDIA           | JAPAN              | MALAYSIA        | SINGAPORE       | SOUTH<br>KOREA   | TAIWAN           | MEXICO<br>(AIR)  |
|---|----------------------|------------------|------------------|------------------------------|------------------|-----------------|--------------------|-----------------|-----------------|------------------|------------------|------------------|
| ESTIMATED TRAVELERS<br>(NUMBER OF RESPONDENTS)                                | 4,791,000<br>(7,063) | 778,000<br>(728) | 309,000<br>(231) | 402,000<br>(1,210)           | 146,000<br>(202) | 98,000<br>(176) | 722,000<br>(1,665) | 28,000<br>(216) | 65,000<br>(236) | 252,000<br>(262) | 191,000<br>(958) | 496,000<br>(186) |
| <b>San Jose MSA</b><br>(Santa Clara County)                                   | 345,000<br>7.2%      | 40,000<br>5.1%   | 26,000<br>8.3%   | 7,000<br>1.7%                | 17,000<br>11.6%  | 24,000<br>24.4% | 65,000<br>9.0%     | 5,000<br>19.5%  | 6,000<br>9.2%   | 38,000<br>15.0%  | 26,000<br>13.8%  | 12,000<br>2.4%   |
| Knott's Berry Farm  | 5,000<br>0.1%        | -<br>-           | -<br>-           | 2,000<br>0.5%                | 1,000<br>0.4%    | -<br>-          | -<br>-             | -<br>-          | 1,000<br>0.8%   | -<br>-           | <1,000<br>0.1%   | -<br>-           |
| <b>Riverside-San Bernardino MSA</b><br>(Riverside-San Bernardino<br>Counties) | 192,000<br>4.0%      | 62,000<br>8.0%   | 34,000<br>11.1%  | 23,000<br>5.6%               | <1,000<br>0.2%   | 1,000<br>0.8%   | 12,000<br>1.6%     | 1,000<br>3.4%   | <1,000<br>0.2%  | 7,000<br>2.6%    | 4,000<br>2.1%    | 41,000<br>8.2%   |
| <b>Salinas-Seaside-Monterey MSA</b><br>(Monterey County)                      | 177,000<br>3.7%      | 35,000<br>4.5%   | 19,000<br>6.1%   | 7,000<br>1.8%                | 6,000<br>4.3%    | 1,000<br>1.5%   | 14,000<br>2.0%     | <1,000<br>0.2%  | 3,000<br>4.4%   | 8,000<br>3.2%    | 1,000<br>0.6%    | 3,000<br>0.7%    |
| <b>Sacramento MSA</b><br>(El Dorado-Placer-Sacramento-<br>Yolo Counties)      | 168,000<br>3.5%      | 51,000<br>6.5%   | 12,000<br>4.0%   | 14,000<br>3.4%               | 1,000<br>0.9%    | 3,000<br>3.0%   | 5,000<br>0.7%      | 1,000<br>3.2%   | 3,000<br>4.6%   | 8,000<br>3.2%    | 2,000<br>1.0%    | 14,000<br>2.8%   |
| <b>Santa Barbara-Lompoc MSA</b><br>(Santa Barbara County)                     | 125,000<br>2.6%      | 31,000<br>4.0%   | 19,000<br>6.0%   | 9,000<br>2.2%                | <1,000<br>0.2%   | <1,000<br>0.5%  | 6,000<br>0.8%      | <1,000<br>1.2%  | -<br>-          | <1,000<br>1.6%   | 1,000<br>0.7%    | -<br>-           |
| <b>Oakland MSA</b><br>(Alameda-Contra Costa<br>Counties)                      | 115,000<br>2.4%      | 24,000<br>3.1%   | 19,000<br>6.3%   | 5,000<br>1.3%                | 5,000<br>3.4%    | 5,000<br>5.1%   | 14,000<br>1.9%     | <1,000<br>0.8%  | 3,000<br>4.2%   | 10,000<br>3.9%   | 6,000<br>3.1%    | 19,000<br>3.8%   |

\*Visitors may report multiple destinations -- percentages are read down the column. Counties with less than a 2% share of the California market were not listed.

Volume estimates by MSA were adjusted for non-response and will differ slightly from the estimates reported by ITA.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

Figure 4  
**PURPOSE OF U.S. TRIP**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.



Table 5

**PURPOSE OF TRIP  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- Almost six in ten (59%) overseas visitors to California reported visiting for vacation/holiday purposes, while approximately four in ten were visiting friends/relatives (41%) and three in ten were on business (31%). Visitors to California attending a convention accounted for 12%. Visitors may list more than one purpose of their trip.
- Visitors from the U.K. (74%) and Australia/New Zealand (71%) indicated high proportions of vacationing during their U.S. trip.
- When compared with visitors from other countries, visitors to California from India (62%), China (61%) and Malaysia (51%) reported a high proportion of visiting for business purposes, while visitors from the U.K and Mexico (18% each respectively), reported the lowest proportion visiting for this reason.

| PURPOSE OF TRIP*        | COUNTRY OF RESIDENCE OF VISITORS |         |         |                              |                 |        |         |          |           |                |         |                 |
|-------------------------|----------------------------------|---------|---------|------------------------------|-----------------|--------|---------|----------|-----------|----------------|---------|-----------------|
|                         | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN  | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000 | 309,000 | 402,000                      | 146,000         | 98,000 | 722,000 | 28,000   | 65,000    | 252,000        | 191,000 | 496,000         |
| (Number of Respondents) | (7,159)                          | (739)   | (235)   | (1,234)                      | (202)           | (178)  | (1,674) | (218)    | (239)     | (265)          | (973)   | (187)           |
| Vacation/Holidays       | 59.4%                            | 73.5%   | 63.1%   | 71.0%                        | 36.4%           | 26.1%  | 48.0%   | 53.1%    | 61.0%     | 49.1%          | 52.4%   | 60.0%           |
| Visit Friends/Relatives | 40.8                             | 37.7    | 42.3    | 51.2                         | 35.2            | 43.6   | 24.4    | 39.0     | 29.1      | 48.2           | 51.7    | 46.8            |
| Business/Professional   | 30.8                             | 17.7    | 33.9    | 20.5                         | 61.0            | 62.3   | 41.1    | 51.1     | 41.9      | 40.9           | 39.4    | 17.7            |
| Attend A Convention     | 11.8                             | 6.4     | 5.9     | 14.2                         | 14.4            | 16.6   | 15.0    | 17.5     | 16.6      | 13.8           | 15.5    | 4.3             |
| Study/Teaching          | 4.7                              | 1.9     | 7.3     | 4.0                          | 8.2             | 3.7    | 5.3     | 3.0      | 2.5       | 5.1            | 6.1     | 0.7             |
| Other                   | 2.4                              | 2.5     | 3.8     | 4.8                          | 1.8             | 1.4    | 1.8     | 1.7      | 1.3       | 1.4            | 3.4     | 1.2             |

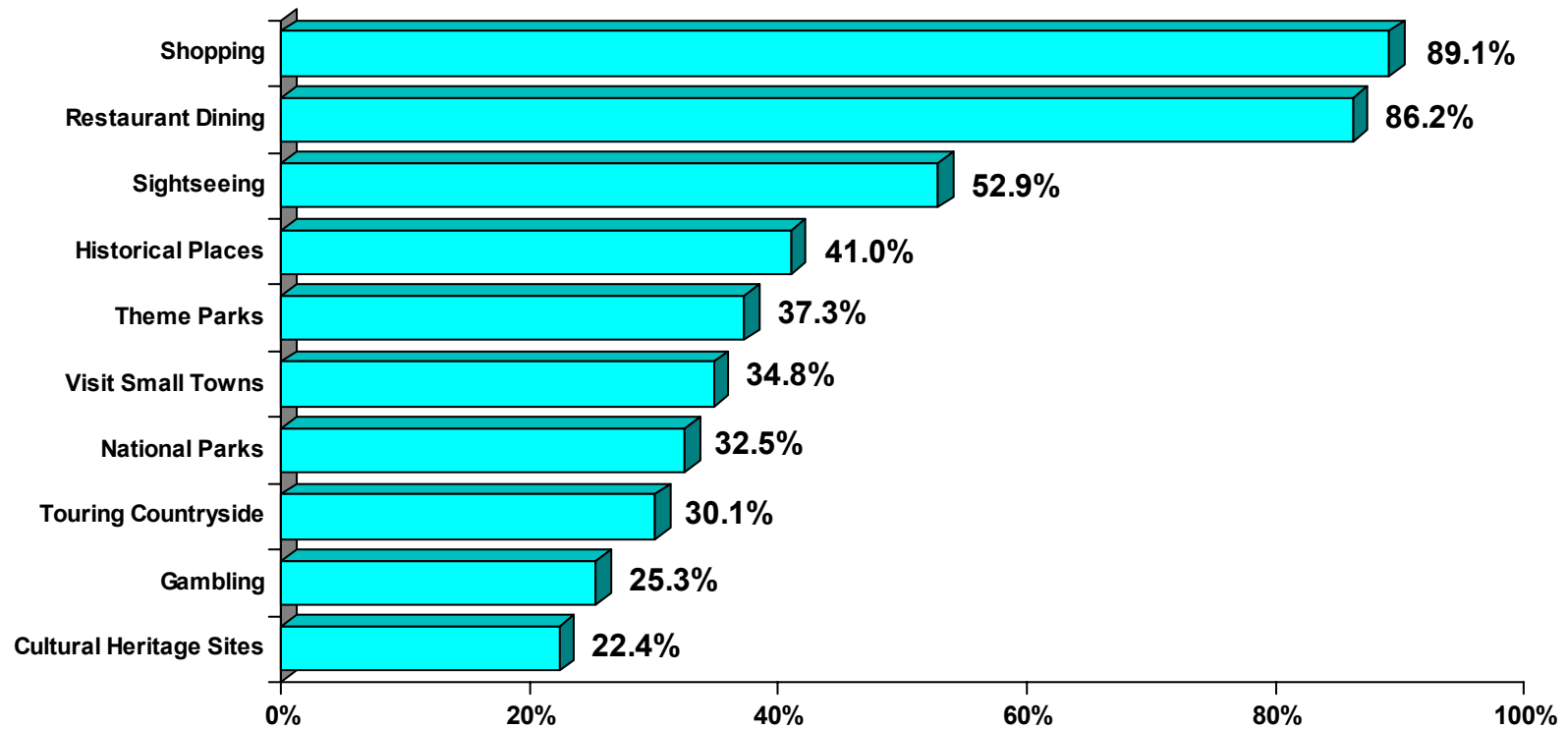
\*Column percentages may total more than 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

Figure 5

# LEISURE RECREATION ACTIVITIES

OVERSEAS VISITORS TO CALIFORNIA  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 6  
**LEISURE-RECREATION ACTIVITIES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

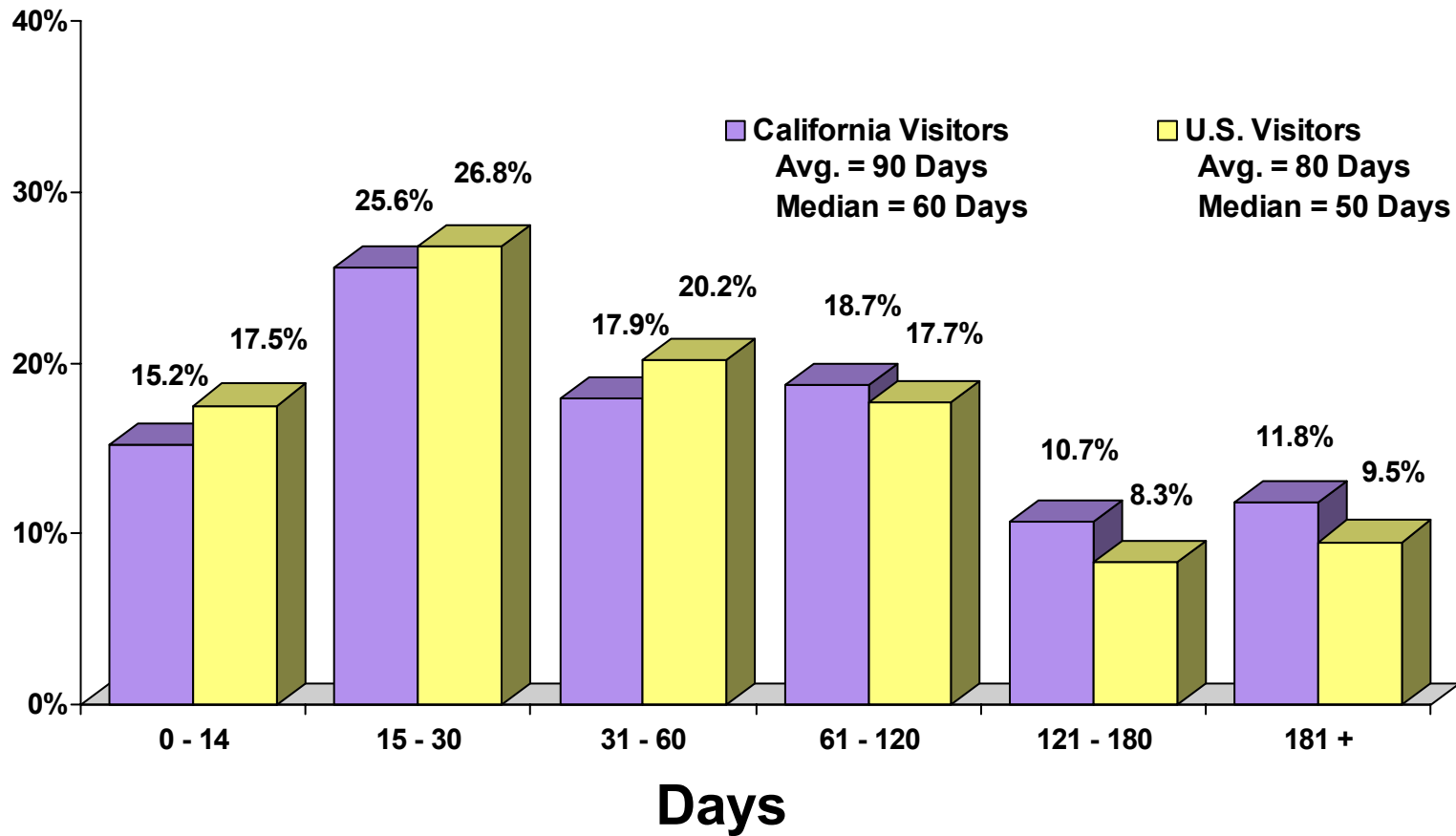
- Shopping (89%), dining in restaurants (86%) followed by sightseeing (53%) were the most common leisure and recreation activities of overseas visitors to California.
- Visitors from Singapore (95%) and Malaysia (94%) had the highest proportion of respondents who mentioned shopping as one their favorite activities, while visitors from the U.K. (94%) had the highest proportion of respondents who mentioned dining in restaurants. Australia/New Zealand as well as the U.K., had the highest proportion of respondents who mentioned sightseeing in cities (62%, and 61% each respectively).

| LEISURE/RECREATION<br>ACTIVITIES* | COUNTRY OF RESIDENCE OF VISITORS |         |         |                |                 |        |         |          |           |                |         |                 |
|-----------------------------------|----------------------------------|---------|---------|----------------|-----------------|--------|---------|----------|-----------|----------------|---------|-----------------|
|                                   | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN  | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS               | 4,791,000                        | 778,000 | 309,000 | 402,000        | 146,000         | 98,000 | 722,000 | 28,000   | 65,000    | 252,000        | 191,000 | 496,000         |
| (Number of Respondents)           | (6,737)                          | (711)   | (222)   | (1,156)        | (192)           | (157)  | (1,579) | (214)    | (231)     | (247)          | (927)   | (160)           |
| Shopping                          | 89.1%                            | 88.2%   | 85.9%   | 91.8%          | 93.2%           | 91.8%  | 86.6%   | 94.4%    | 94.5%     | 85.6%          | 90.0%   | 81.0%           |
| Dining in Restaurants             | 86.2                             | 93.9    | 86.4    | 91.4           | 86.7            | 84.9   | 86.8    | 83.3     | 88.4      | 66.4           | 76.4    | 77.3            |
| Sightseeing in Cities             | 52.9                             | 61.3    | 46.5    | 61.6           | 57.1            | 48.0   | 44.8    | 54.6     | 53.5      | 38.4           | 49.8    | 16.2            |
| Visit Historical Places           | 41.0                             | 49.9    | 49.5    | 60.1           | 44.0            | 41.9   | 9.3     | 40.8     | 33.5      | 25.5           | 29.0    | 40.9            |
| Amusement/Theme Parks             | 37.3                             | 33.4    | 27.4    | 52.3           | 39.9            | 35.2   | 30.0    | 46.1     | 47.8      | 45.9           | 39.0    | 26.1            |
| Visit Small Towns                 | 34.8                             | 42.4    | 41.2    | 39.2           | 26.0            | 12.0   | 25.8    | 26.3     | 18.0      | 17.6           | 19.3    | 42.1            |
| Visit National Parks              | 32.5                             | 44.3    | 47.4    | 29.5           | 37.5            | 26.0   | 14.5    | 25.4     | 26.5      | 29.8           | 22.4    | 25.2            |
| Touring Countryside               | 30.1                             | 42.2    | 49.8    | 37.9           | 29.8            | 15.8   | 11.7    | 31.9     | 16.7      | 25.6           | 13.3    | 4.8             |
| Casinos/Gambling                  | 25.3                             | 32.8    | 20.5    | 30.5           | 33.2            | 25.0   | 14.4    | 18.8     | 20.2      | 22.6           | 24.1    | 15.4            |
| Cultural Heritage Sites           | 22.4                             | 31.7    | 42.6    | 28.2           | 23.8            | 12.7   | 6.7     | 18.1     | 10.4      | 25.7           | 15.4    | 11.2            |
| Art Gallery/Museum                | 21.6                             | 21.3    | 25.3    | 37.7           | 26.0            | 18.9   | 10.3    | 10.2     | 13.4      | 12.8           | 11.8    | 14.7            |
| Guided Tours                      | 20.9                             | 35.8    | 19.2    | 35.3           | 9.1             | 13.1   | 15.1    | 15.7     | 18.5      | 16.2           | 20.5    | 16.0            |
| Water Sports/Sunbathing           | 17.7                             | 32.1    | 29.5    | 22.4           | 10.0            | 5.4    | 6.9     | 2.9      | 4.4       | 7.7            | 6.8     | 11.7            |
| Concert/Play/Musical              | 15.4                             | 19.0    | 16.0    | 27.0           | 11.0            | 5.2    | 9.4     | 8.0      | 9.7       | 11.5           | 8.1     | 7.4             |
| Nightclubs/Dancing                | 13.3                             | 17.1    | 14.8    | 17.7           | 4.7             | 9.8    | 6.9     | 11.1     | 7.8       | 7.6            | 4.8     | 18.2            |
| Camping/Hiking                    | 7.1                              | 9.0     | 11.6    | 8.3            | 2.6             | 5.8    | 2.5     | 5.1      | 4.9       | 3.4            | 3.2     | 4.7             |
| Golfing/Tennis                    | 7.1                              | 5.9     | 4.1     | 6.8            | 9.0             | 6.0    | 10.2    | 3.2      | 2.9       | 18.7           | 8.0     | 1.0             |
| Attend Sports Event               | 7.0                              | 7.1     | 7.1     | 14.5           | 5.7             | 3.4    | 5.1     | 1.2      | 4.0       | 6.4            | 5.0     | 2.4             |
| Visit Am. Indian Comm.            | 6.5                              | 7.4     | 12.1    | 6.8            | 1.7             | 9.4    | 1.8     | 2.7      | 0.8       | 6.1            | 1.8     | 0.6             |
| Ethnic Heritage Sites             | 5.9                              | 9.9     | 7.0     | 7.3            | 2.7             | 3.9    | 1.8     | 5.1      | 4.2       | 5.6            | 2.6     | 3.8             |
| Cruises                           | 5.9                              | 5.7     | 4.4     | 12.9           | 6.2             | 7.8    | 4.4     | 4.7      | 4.0       | 11.7           | 5.4     | 1.8             |
| Environ./Eco. Excursions          | 4.5                              | 4.3     | 3.1     | 6.5            | 9.1             | 5.6    | 1.0     | 0.8      | 1.9       | 4.1            | 5.4     | 5.5             |
| Snow Skiing                       | 2.6                              | 6.2     | 1.8     | 5.1            | 1.6             | 3.9    | 0.6     | 3.0      | 4.8       | 0.2            | 2.1     | 5.7             |
| Ranch Vacations                   | 2.4                              | 3.8     | 0.6     | 2.1            | -               | 0.6    | 0.9     | 1.3      | 0.3       | 1.9            | 2.2     | 0.6             |
| Hunting/Fishing                   | 1.1                              | 0.9     | 0.6     | 1.5            | 1.8             | -      | 0.6     | 1.8      | 2.1       | 2.7            | 0.8     | 0.3             |

\*Multiple response. Only responses 1.0 percent or greater are detailed.

Source: IIA/O111 Survey of International Air Travelers, 2005. CIC Research, Inc.

**Figure 6**  
**ADVANCE TRIP DECISION**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2005)



Source: ITA "In-Flight" Survey, 2005  
 CIC Research, Inc.

Table 7

**ADVANCE TRIP DECISION  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

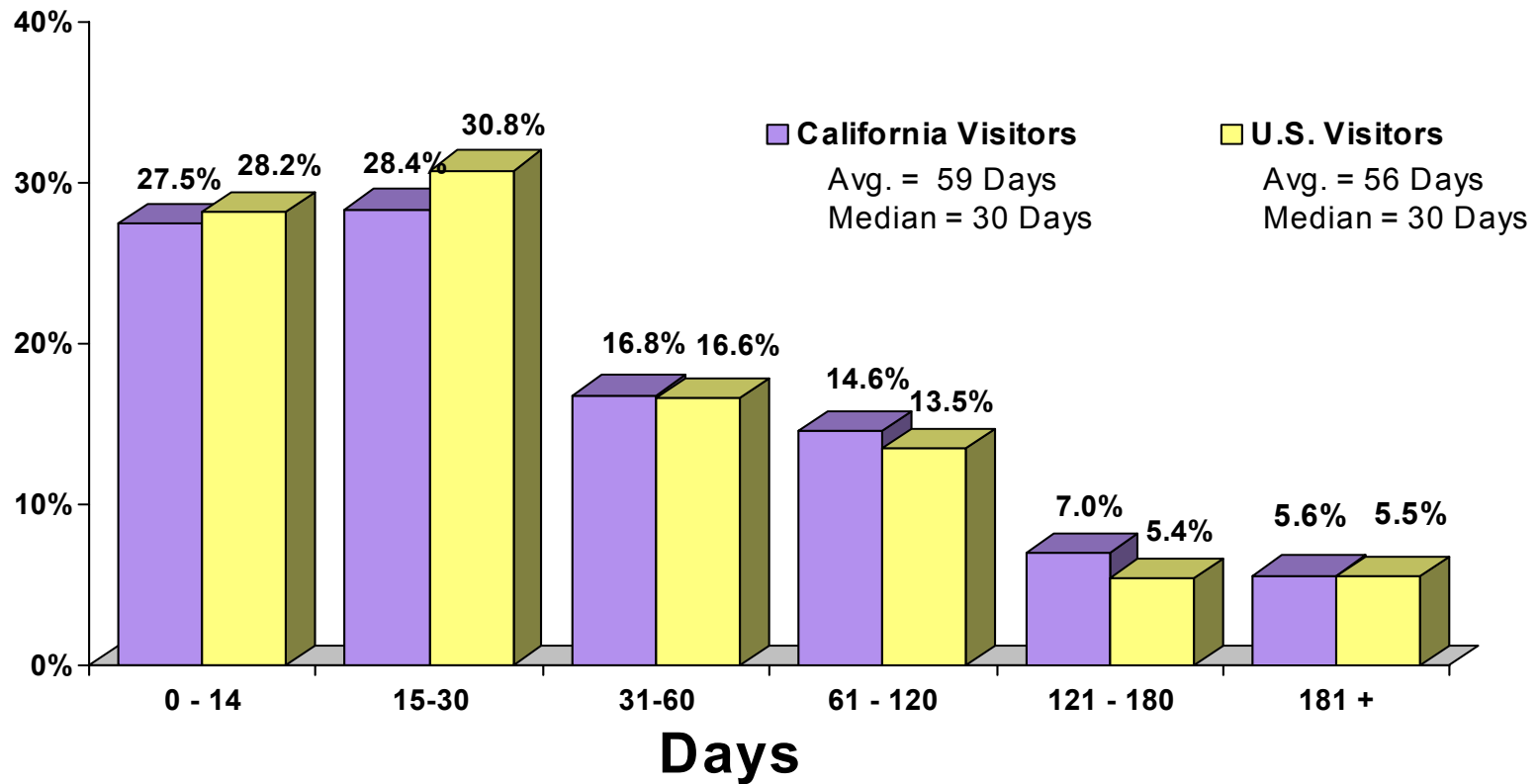
- The median time period for overseas visitors' decision to travel was 60 days before the actual trip, compared to 50 days in 2004 and 40 days in 2003.
- Respondents from the U.K. and Australia/New Zealand had the longest planning time frame at a median of 100 days and 90 days each respectively.

| ADVANCE TRIP DECISION*  | COUNTRY OF RESIDENCE OF VISITORS |               |               |                              |                 |               |               |               |               |                |               |                 |
|-------------------------|----------------------------------|---------------|---------------|------------------------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                         | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000       | 309,000       | 402,000                      | 146,000         | 98,000        | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (Number of Respondents) | (6,791)                          | (704)         | (227)         | (1,186)                      | (191)           | (160)         | (1,600)       | (200)         | (221)         | (258)          | (917)         | (173)           |
| 14 Days or Less         | 15.2%                            | 9.1%          | 13.1%         | 7.6%                         | 23.1%           | 21.3%         | 22.9%         | 26.5%         | 23.2%         | 25.4%          | 28.6%         | 13.8%           |
| 15 - 30 Days            | 25.6                             | 13.1          | 18.7          | 14.7                         | 35.2            | 46.5          | 33.5          | 34.9          | 32.5          | 37.4           | 34.6          | 48.6            |
| 31 - 60 Days            | 17.9                             | 15.0          | 16.6          | 17.7                         | 18.4            | 18.5          | 23.0          | 12.3          | 20.9          | 22.1           | 21.6          | 14.7            |
| 61 - 120 Days           | 18.7                             | 18.3          | 24.3          | 25.0                         | 17.3            | 11.0          | 14.1          | 20.1          | 15.2          | 10.3           | 10.6          | 11.9            |
| 121 - 180 Days          | 10.7                             | 18.1          | 11.9          | 15.0                         | 3.8             | 2.7           | 3.7           | 5.0           | 6.2           | 3.0            | 3.3           | 7.1             |
| 181 or More Days        | 11.8                             | 26.4          | 15.4          | 20.0                         | 2.1             | -             | 2.9           | 1.2           | 2.0           | 1.8            | 1.5           | 3.9             |
| <b>TOTAL</b>            | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>                | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Average No. of Days     | 89.6                             | 138.8         | 101.2         | 129.5                        | 48.9            | 37.8          | 51.6          | 50.6          | 52.9          | 44.9           | 43.4          | 53.5            |
| Median No. of Days      | 60.0                             | 100.0         | 65.0          | 90.0                         | 30.0            | 30.0          | 30.0          | 30.0          | 30.0          | 30.0           | 30.0          | 30.0            |

\*Column percentages may not total 100 percent due to rounding.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 7**  
**ADVANCE AIRLINE DECISION**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 8

**ADVANCE TICKET PURCHASE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- An overseas visitor committed to an airline ticket purchase a median of 30 days prior to the actual trip. About six percent of travelers booked their airline reservations six months or more in advance of their trip.
- Visitors from the United Kingdom and Australia/New Zealand booked their airline tickets a median of 2 months or more in advance. By contrast, visitors from South Korea, China, India, Taiwan, Malaysia and Mexico (air) only booked airline tickets a median of 19 days or less in advance of their U.S. trip.

| ADVANCE AIRLINE<br>RESERVATIONS* | COUNTRY OF RESIDENCE OF VISITORS |               |               |                              |                 |               |               |               |               |                |               |                 |
|----------------------------------|----------------------------------|---------------|---------------|------------------------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                                  | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS              | 4,791,000                        | 778,000       | 309,000       | 402,000                      | 146,000         | 98,000        | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (Number of Respondents)          | (6,554)                          | (684)         | (222)         | (1,170)                      | (184)           | (158)         | (1,501)       | (198)         | (218)         | (248)          | (888)         | (164)           |
| 14 Days or less                  | 27.5%                            | 14.2%         | 18.9%         | 17.3%                        | 41.5%           | 34.4%         | 35.4%         | 42.4%         | 34.8%         | 51.6%          | 48.8%         | 39.9%           |
| 15 - 30 Days                     | 28.4                             | 15.5          | 21.8          | 23.9                         | 49.3            | 50.6          | 39.3          | 32.8          | 36.7          | 37.4           | 39.0          | 40.8            |
| 31 - 60 Days                     | 16.8                             | 17.6          | 20.9          | 19.0                         | 5.6             | 10.1          | 17.4          | 8.6           | 16.5          | 7.0            | 6.6           | 8.8             |
| 61 - 120 Days                    | 14.6                             | 22.8          | 22.6          | 24.7                         | 2.2             | 3.1           | 6.0           | 13.0          | 10.9          | 2.4            | 4.5           | 5.0             |
| 121 - 180 Days                   | 7.0                              | 11.3          | 10.0          | 7.3                          | 0.2             | 1.9           | 1.6           | 2.7           | 1.1           | -              | 0.9           | 5.4             |
| 181 or More Days                 | 5.6                              | 18.4          | 5.9           | 7.9                          | 1.3             | -             | 0.4           | 0.4           | -             | -              | 0.2           | -               |
| <b>TOTAL</b>                     | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>                | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Average No. of Days              | 58.5                             | 105.2         | 70.2          | 73.0                         | 21.3            | 25.2          | 31.5          | 35.1          | 33.1          | 19.9           | 22.9          | 30.3            |
| Median No. of Days               | 30.0                             | 80.0          | 55.0          | 60.0                         | 15.0            | 15.0          | 30.0          | 19.0          | 30.0          | 14.0           | 15.0          | 18.0            |

\*Column percentages may not total 100 percent due to rounding.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.  
CIC Research, Inc.

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Table 9

**MEANS OF BOOKING AIR TRIP AND LODGING  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- Approximately six in ten overseas visitors to California used a travel agent to make airline reservations (57%). In comparison, one quarter (26%) of visitors used a travel agent to make lodging arrangements. Visitors from Australia/New Zealand reported the highest use of travel agents in booking their air trip (76%). Visitors from Mexico (air) as well as from Australia/New Zealand reported the highest use of travel agents in booking their lodging (40% and 37% each respectively).
- Visitors from the U.K. reported the highest use of a personal computer in booking their air trip (24%), whereas visitors from Mexico (air) reported the highest proportion who booked with the airline directly (31%), and visitors from China and India reported the highest use of a company travel department (27% each respectively.)

| MEANS OF BOOKING AIR TRIP*      | COUNTRY OF RESIDENCE OF VISITORS |               |               |                |                 |               |               |               |               |                |               |                 |
|---------------------------------|----------------------------------|---------------|---------------|----------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                                 | AUSTRALIA/                       |               |               |                |                 |               |               |               |               |                |               |                 |
|                                 | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS             | 4,791,000                        | 778,000       | 309,000       | 402,000        | 146,000         | 98,000        | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (Number of Respondents)         | (6,973)                          | (724)         | (229)         | (1,191)        | (200)           | (167)         | (1,655)       | (212)         | (228)         | (259)          | (943)         | (182)           |
| Travel Agent                    | 56.8%                            | 40.5%         | 59.8%         | 76.3%          | 48.8%           | 68.9%         | 57.9%         | 69.8%         | 58.0%         | 64.2%          | 63.9%         | 53.3%           |
| Personal Computer               | 13.0                             | 23.7          | 13.5          | 4.6            | 3.9             | 1.0           | 7.9           | 1.3           | 7.5           | 6.9            | 7.7           | 5.4             |
| Airline Directly                | 11.4                             | 12.9          | 8.7           | 10.9           | 8.8             | 2.7           | 10.0          | 7.8           | 13.6          | 14.3           | 6.8           | 30.6            |
| Company Travel Dept.            | 10.3                             | 8.8           | 12.1          | 5.0            | 27.3            | 26.9          | 13.8          | 19.3          | 17.0          | 10.8           | 12.3          | 7.4             |
| Tour Operator                   | 5.3                              | 11.0          | 2.2           | 0.8            | 1.8             | 0.5           | 7.9           | 1.2           | 1.2           | 3.5            | 6.6           | 0.5             |
| Travel Club                     | 0.7                              | 0.5           | 1.9           | 0.5            | 0.9             | -             | 0.2           | -             | 1.0           | 0.1            | 0.6           | 2.5             |
| Don't Know/Other                | 2.5                              | 2.7           | 1.8           | 1.9            | 8.6             | 0.0           | 2.4           | 0.6           | 1.7           | 0.2            | 2.2           | 0.3             |
| <b>TOTAL</b>                    | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| <b>MEANS OF BOOKING LODGING</b> |                                  |               |               |                |                 |               |               |               |               |                |               |                 |
| (Number of Respondents)         | (7,033)                          | (727)         | (233)         | (1,224)        | (201)           | (174)         | (1,632)       | (215)         | (237)         | (263)          | (967)         | (179)           |
| <b>Yes, Booked by**</b>         | <b>67.7%</b>                     | <b>71.7%</b>  | <b>64.6%</b>  | <b>64.5%</b>   | <b>69.0%</b>    | <b>55.5%</b>  | <b>86.7%</b>  | <b>77.8%</b>  | <b>79.5%</b>  | <b>72.2%</b>   | <b>60.4%</b>  | <b>60.7%</b>    |
| Travel Agent                    | 26.4%                            | 27.0%         | 25.3%         | 37.0%          | 19.8%           | 15.0%         | 29.7%         | 16.9%         | 22.6%         | 23.0%          | 28.2%         | 39.9%           |
| Other                           | 11.1                             | 11.9          | 9.7           | 12.8           | 2.9             | 3.6           | 15.5          | 17.4          | 17.6          | 14.0           | 6.1           | 10.2            |
| Hotel/Motel Directly            | 10.3                             | 14.4          | 6.9           | 14.8           | 3.8             | 3.4           | 12.9          | 8.0           | 16.3          | 5.5            | 1.6           | 6.6             |
| Company Travel Dept.            | 9.5                              | 8.0           | 10.0          | 4.9            | 25.4            | 31.3          | 12.3          | 27.1          | 15.2          | 13.8           | 9.6           | 2.0             |
| Friend or Relative              | 6.3                              | 2.6           | 3.9           | 4.2            | 10.2            | 2.4           | 6.8           | 14.7          | 6.8           | 12.0           | 7.4           | 3.4             |
| Tour Operator                   | 5.5                              | 11.0          | 7.7           | 2.3            | 3.3             | 0.5           | 7.2           | 0.8           | 2.1           | 0.4            | 4.8           | 1.9             |
| Business Associate              | 4.4                              | 2.1           | 5.8           | 2.7            | 5.7             | 5.2           | 8.6           | 6.7           | 8.7           | 5.4            | 6.0           | 0.3             |
| Airline Staff                   | 0.8                              | 0.5           | 0.4           | 1.0            | 0.8             | 0.5           | 1.0           | 1.3           | 1.8           | 0.7            | 2.2           | 0.8             |
| <b>No</b>                       | <b>32.3%</b>                     | <b>28.3%</b>  | <b>35.4%</b>  | <b>35.5%</b>   | <b>31.0%</b>    | <b>44.5%</b>  | <b>13.3%</b>  | <b>22.2%</b>  | <b>20.5%</b>  | <b>27.8%</b>   | <b>39.6%</b>  | <b>39.3%</b>    |

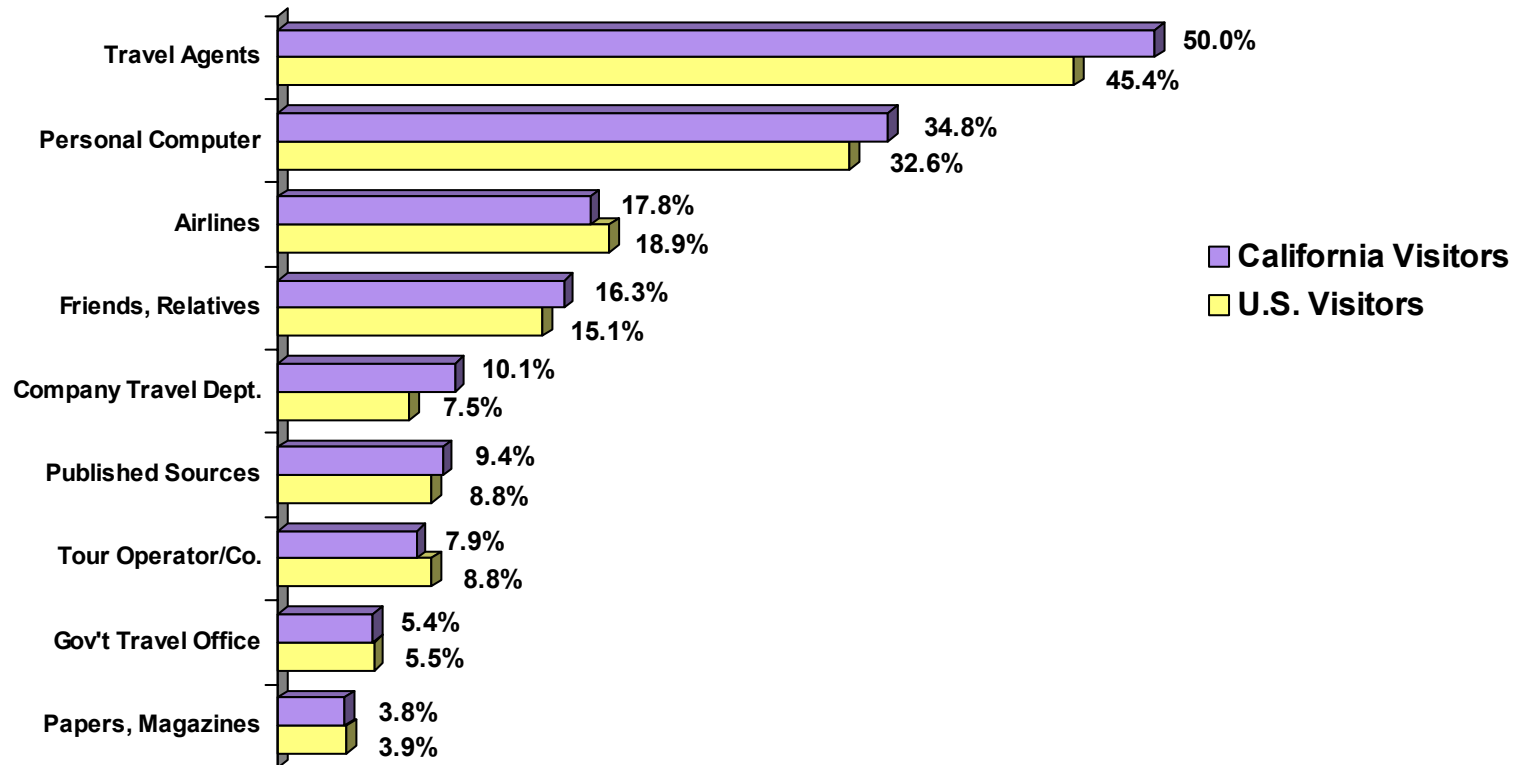
\*Column percentages may not total to 100 percent due to rounding.

\*\* Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.

CIC Research, Inc.

**Figure 8**  
**TRAVEL INFORMATION SOURCES**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2005)



Source: ITA "In-Flight" Survey, 2005  
 CIC Research, Inc.

Table 10

**U.S. TRIP INFORMATION SOURCES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- Consistent with previous years, the majority of the overseas travelers to California (50%) used information from travel agencies to plan their trip. The usage of a personal computer (i.e., the Internet) continued to increase from 30% in 2003 to 32% in 2004 and to 35% in 2005. Travelers who called the airlines directly (18%), those who relied on friends/relatives (16%), and those who used the corporate travel department (10%) rounded out the top five information sources.
- Visitors from Australia/New Zealand (71%) followed by those from Malaysia (62%) showed the highest use of travel agencies as information sources. Use of a personal computer was the second highest source of information for overseas travelers. South Korean travelers (44%), as well as travelers from Japan, and Singapore (41% each respectively) all reported high computer usage.

| INFORMATION SOURCES*    | COUNTRY OF RESIDENCE OF VISITORS |                           |         |         |         |        |         |          |           |         |         |                 |
|-------------------------|----------------------------------|---------------------------|---------|---------|---------|--------|---------|----------|-----------|---------|---------|-----------------|
|                         | TOTAL<br>OVERSEAS                | AUSTRALIA/<br>NEW ZEALAND |         |         |         |        | CHINA   |          |           | SOUTH   |         | MEXICO<br>(AIR) |
|                         |                                  | U.K.                      | GERMANY | ZEALAND | w/o HK  | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | KOREA   | TAIWAN  |                 |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000                   | 309,000 | 402,000 | 146,000 | 98,000 | 722,000 | 28,000   | 65,000    | 252,000 | 191,000 | 496,000         |
| (Number of Respondents) | (7,092)                          | (732)                     | (235)   | (1,223) | (200)   | (176)  | (1,654) | (217)    | (238)     | (265)   | (965)   | (185)           |
| Travel Agency           | 50.0%                            | 41.5%                     | 38.5%   | 70.6%   | 33.5%   | 55.8%  | 47.8%   | 62.3%    | 49.4%     | 53.4%   | 59.5%   | 48.1%           |
| Personal Computer       | 34.8                             | 39.4                      | 30.2    | 31.4    | 11.6    | 16.2   | 40.5    | 34.0     | 40.5      | 44.4    | 26.6    | 23.6            |
| Airlines Directly       | 17.8                             | 20.6                      | 16.9    | 16.9    | 19.6    | 9.3    | 14.8    | 26.9     | 25.8      | 17.7    | 19.7    | 35.2            |
| Friends/Relatives       | 16.3                             | 14.1                      | 16.3    | 21.4    | 17.2    | 14.3   | 16.0    | 24.7     | 15.8      | 18.7    | 17.5    | 6.0             |
| Corporate Travel Dept.  | 10.1                             | 6.8                       | 12.2    | 5.1     | 30.5    | 33.9   | 16.2    | 21.8     | 14.2      | 10.6    | 10.3    | 7.5             |
| Travel Guides           | 9.4                              | 13.2                      | 13.1    | 10.2    | 2.9     | 2.1    | 10.4    | 16.3     | 10.6      | 2.6     | 6.5     | 0.3             |
| Tour Company            | 7.9                              | 13.3                      | 8.9     | 5.7     | 6.1     | 2.5    | 16.4    | 12.2     | 2.2       | 3.2     | 5.7     | 1.2             |
| Government Sources      | 5.4                              | 4.6                       | 25.9    | 5.3     | 4.1     | 1.8    | 2.8     | 5.5      | 6.1       | 1.0     | 2.1     | 3.9             |
| Newspapers/Magazines    | 3.8                              | 4.9                       | 4.1     | 4.5     | 0.4     | 3.4    | 3.9     | 5.9      | 7.9       | 2.7     | 3.4     | -               |
| In-flight Info. Systems | 1.3                              | 0.6                       | 1.1     | 0.8     | 0.7     | -      | 0.7     | 2.4      | 2.7       | 1.5     | 2.2     | 0.7             |
| TV/Radio                | 1.4                              | 1.1                       | 2.9     | 1.9     | 0.4     | 1.7    | 1.4     | 2.0      | 0.8       | 0.8     | 1.3     | -               |

\*Column percentages may total more than 100 percent due to multiple responses.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.  
CIC Research, Inc.

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Table 11

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- More than seven in ten (72%) overseas visitors to California used an economy/tourist ticket, while 18% used a business class ticket. Malaysian (8%), Mexican (air) (7%), and travelers from Singapore (4%) reported the highest use of first class tickets.
- Fifteen percent (15%) of overseas travelers to California traveled with an inclusive tour package, where airfare, lodging, ground transportation, or other items were prepaid prior to departure. Visitors from the U.K. (22%) , Germany, and China (20% each respectively) took the greatest advantage of inclusive tour packages. On the other hand, fewest visitors from India and Malaysia (4% each respectively) used tour packages.

| COUNTRY OF RESIDENCE OF VISITORS |                   |              |              |                |                 |              |              |              |              |                |              |                 |
|----------------------------------|-------------------|--------------|--------------|----------------|-----------------|--------------|--------------|--------------|--------------|----------------|--------------|-----------------|
| TYPE OF AIRLINE TICKET*          | AUSTRALIA/        |              |              |                |                 |              |              |              |              |                |              |                 |
|                                  | TOTAL<br>OVERSEAS | U.K.         | GERMANY      | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA        | JAPAN        | MALAYSIA     | SINGAPORE    | SOUTH<br>KOREA | TAIWAN       | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS              | 4,791,000         | 778,000      | 309,000      | 402,000        | 146,000         | 98,000       | 722,000      | 28,000       | 65,000       | 252,000        | 191,000      | 496,000         |
| (Number of Respondents)          | (6,855)           | (717)        | (223)        | (1,179)        | (191)           | (169)        | (1,628)      | (216)        | (233)        | (252)          | (930)        | (162)           |
| Economy/Tourist/Coach            | 72.0%             | 78.3%        | 74.3%        | 72.0%          | 73.0%           | 86.5%        | 52.7%        | 58.1%        | 65.2%        | 84.9%          | 64.9%        | 76.7%           |
| Executive/Business               | 17.5              | 11.4         | 17.7         | 16.2           | 13.5            | 11.3         | 33.0         | 29.9         | 26.2         | 6.1            | 22.0         | 22.3            |
| Frequent Flyer Upgrade           | 4.1               | 2.5          | 6.2          | 3.9            | 0.2             | 0.3          | 11.2         | 0.9          | 1.1          | 3.8            | 5.7          | 4.9             |
| Frequent Flyer Award             | 3.3               | 2.9          | 1.6          | 5.1            | 2.5             | 0.5          | 2.6          | 1.4          | 4.6          | 1.7            | 1.5          | 0.8             |
| Discount/Group Fare              | 2.8               | 1.7          | 0.9          | 2.1            | 6.4             | 0.8          | 5.6          | 2.7          | 2.4          | 7.5            | 5.4          | 0.1             |
| First Class                      | 2.1               | 1.7          | 0.4          | 0.9            | 1.5             | 0.9          | 3.0          | 7.6          | 4.1          | 0.9            | 2.1          | 7.3             |
| Non-Revenue                      | 1.0               | 1.1          | 1.6          | 2.6            | -               | 0.3          | 0.7          | 1.6          | 0.4          | 0.4            | 0.2          | -               |
| Don't Know                       | 2.4               | 2.8          | 2.0          | 1.4            | 4.3             | 1.1          | 4.3          | 0.5          | 1.1          | 0.2            | 1.5          | 1.5             |
| USE OF PREPAID PACKAGE           |                   |              |              |                |                 |              |              |              |              |                |              |                 |
| (Number of Respondents)          | (7,015)           | (732)        | (232)        | (1,213)        | (193)           | (170)        | (1,663)      | (213)        | (237)        | (257)          | (956)        | (172)           |
| <b>YES**</b>                     | <b>14.7%</b>      | <b>22.2%</b> | <b>19.9%</b> | <b>14.5%</b>   | <b>19.5%</b>    | <b>4.0%</b>  | <b>15.6%</b> | <b>4.4%</b>  | <b>6.7%</b>  | <b>6.8%</b>    | <b>15.6%</b> | <b>8.4%</b>     |
| Air/Lodging                      | 9.8               | 15.3         | 16.0         | 8.4            | 6.5             | 3.7          | 13.2         | 2.1          | 4.4          | 4.0            | 10.6         | 5.3             |
| Guided Tour                      | 7.7               | 8.7          | 12.4         | 7.7            | 14.2            | 1.1          | 7.1          | 2.3          | 6.5          | 5.9            | 8.6          | 4.4             |
| Air/Lodging/Tour                 | 4.3               | 3.7          | 11.2         | 3.6            | 4.7             | 1.1          | 5.6          | 1.0          | 4.1          | 3.4            | 5.4          | 1.6             |
| Air/Lodging/Bus                  | 3.5               | 3.2          | 8.3          | 3.8            | 3.4             | 1.1          | 3.7          | 1.3          | 2.5          | 3.4            | 5.1          | 0.2             |
| Air/Rent Car                     | 3.4               | 6.1          | 7.3          | 2.7            | 12.0            | 2.1          | 0.8          | 0.7          | -            | 0.5            | 5.1          | 0.1             |
| Air/Lodging/Bus/Tour             | 2.9               | 1.8          | 8.3          | 2.2            | 3.0             | 0.5          | 2.8          | 1.0          | 2.5          | 3.4            | 4.5          | 0.1             |
| Air/Lodging/Rent Car             | 2.5               | 4.9          | 4.6          | 2.1            | 4.1             | 1.8          | 0.8          | 0.4          | -            | 0.3            | 4.0          | 0.1             |
| Cruise                           | 1.0               | 1.8          | 1.8          | 1.5            | 1.4             | 1.5          | 0.5          | 1.3          | 1.1          | 1.9            | 2.2          | 0.1             |
| <b>NO</b>                        | <b>85.3%</b>      | <b>77.8%</b> | <b>80.1%</b> | <b>85.5%</b>   | <b>80.5%</b>    | <b>96.0%</b> | <b>84.4%</b> | <b>95.6%</b> | <b>93.3%</b> | <b>93.2%</b>   | <b>84.4%</b> | <b>91.6%</b>    |
| TOTAL                            | 100.0%            | 100.0%       | 100.0%       | 100.0%         | 100.0%          | 100.0%       | 100.0%       | 100.0%       | 100.0%       | 100.0%         | 100.0%       | 100.0%          |

\*Column percentages may not total 100 percent due to multiple response.

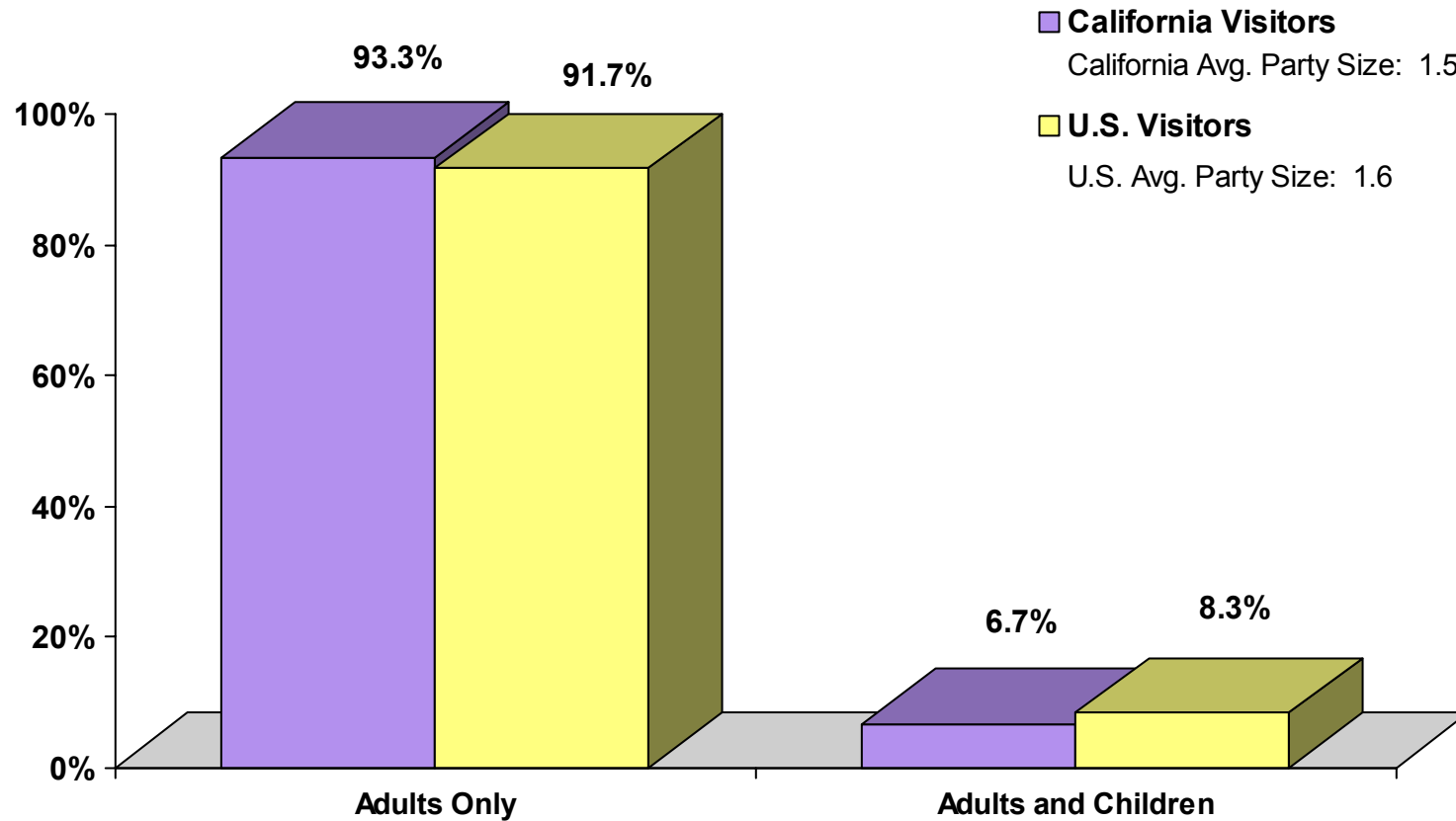
\*\*Multiple response. Includes all package combinations. Each category not mutually exclusive.

\*\*\*Caution - small sample size.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.

CIC Research, Inc.

Figure 9  
**TRAVEL PARTY SIZE**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 12

**TRAVEL PARTY SIZE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- The mean total party size for all overseas travelers was 1.5 persons. Overall, 93% of overseas travel parties were adults only and 7% were adults traveling with children. The greatest proportion of visitors who reported traveling with children, were from Mexico (13%), followed by Australia/New Zealand, and Singapore (12% each respectively).

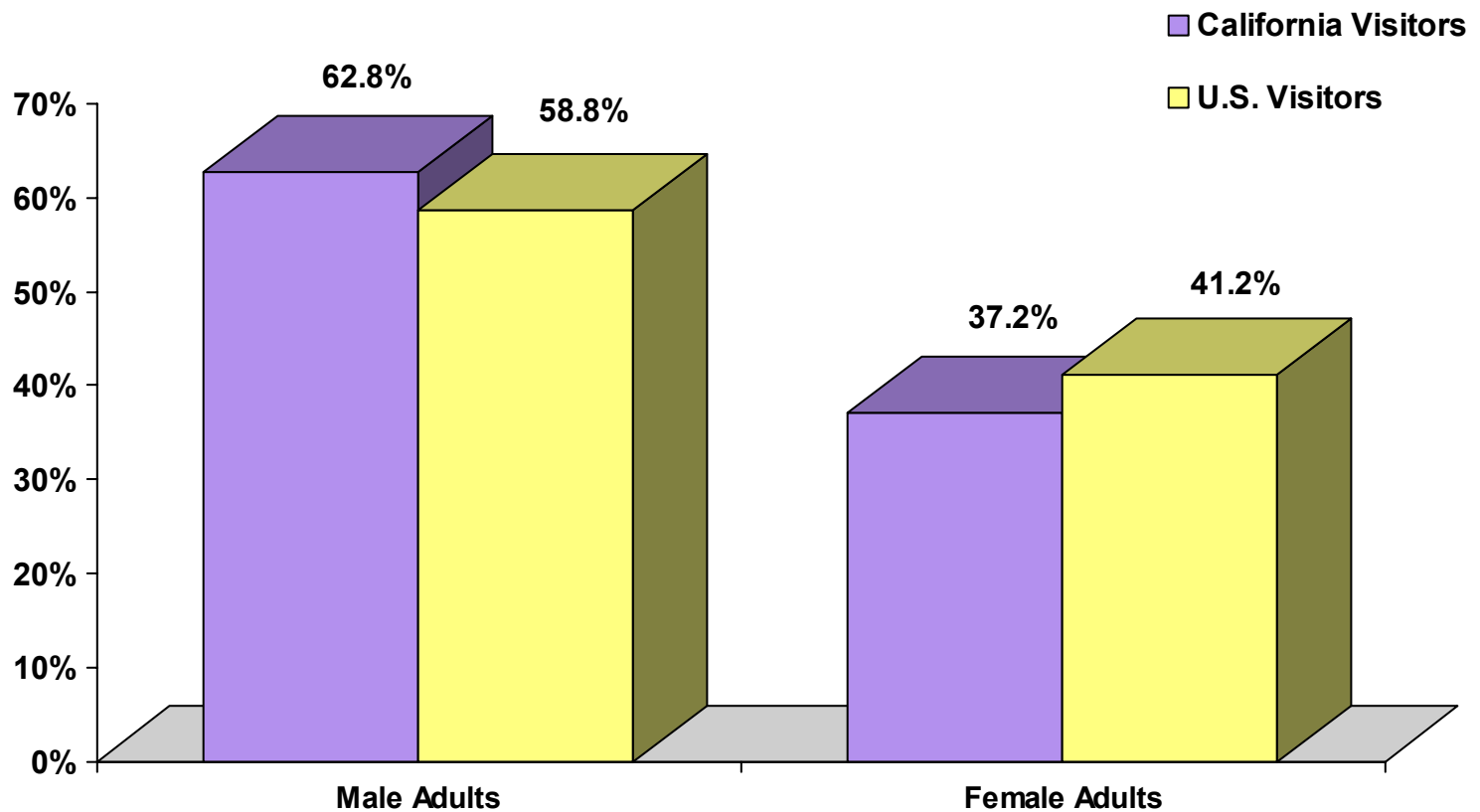
| TRAVEL PARTY SIZE          | COUNTRY OF RESIDENCE OF VISITORS |               |               |                |                               |               |               |               |               |                |               |                 |
|----------------------------|----------------------------------|---------------|---------------|----------------|-------------------------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                            | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | NEW<br>ZEALAND | AUSTRALIA/<br>CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS        | 4,791,000                        | 778,000       | 309,000       | 402,000        | 146,000                       | 98,000        | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (Number of Respondents)    | (7,155)                          | (739)         | (234)         | (1,232)        | (202)                         | (178)         | (1,678)       | (218)         | (240)         | (266)          | (970)         | (186)           |
| Adults Only                | 93.3%                            | 94.6%         | 94.4%         | 87.6%          | 94.1%                         | 97.4%         | 94.1%         | 92.8%         | 88.4%         | 93.7%          | 91.9%         | 87.1%           |
| Adults and Children        | 6.7                              | 5.4           | 5.6           | 12.4           | 5.9                           | 2.6           | 5.9           | 7.2           | 11.6          | 6.3            | 8.1           | 12.9            |
| <b>TOTAL</b>               | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>                 | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Average Total Party Size   | 1.5                              | 1.7           | 1.4           | 1.7            | 1.7                           | 1.3           | 1.5           | 1.5           | 1.5           | 1.5            | 1.6           | 1.7             |
| Median Total Party Size    | 1.0                              | 2.0           | 1.0           | 1.0            | 1.0                           | 1.0           | 1.0           | 1.0           | 1.0           | 1.0            | 1.0           | 1.0             |
| <b>ADULTS ONLY</b>         |                                  |               |               |                |                               |               |               |               |               |                |               |                 |
| (Number of Respondents)    | (6,416)                          | (682)         | (215)         | (1,044)        | (190)                         | (172)         | (1,546)       | (190)         | (191)         | (233)          | (876)         | (157)           |
| Average Adult Party Size   | 1.4                              | 1.6           | 1.3           | 1.4            | 1.5                           | 1.2           | 1.4           | 1.4           | 1.2           | 1.3            | 1.4           | 1.4             |
| Median Adult Party Size    | 1.0                              | 1.0           | 1.0           | 1.0            | 1.0                           | 1.0           | 1.0           | 1.0           | 1.0           | 1.0            | 1.0           | 1.0             |
| <b>ADULTS AND CHILDREN</b> |                                  |               |               |                |                               |               |               |               |               |                |               |                 |
| (Number of Respondents)    | (739)                            | (57)*         | (19)*         | (188)          | (12)*                         | (6)*          | (132)         | (28)*         | (49)*         | (33)*          | (94)*         | (29)*           |
| Average Party Size         | 3.6                              | 3.4           | 3.4           | 3.8            | 3.7                           | 3             | 3.5           | 3.7           | 3.8           | 3.9            | 3.4           | 3.1             |
| Median Party Size          | 3.0                              | 3.0           | 4.0           | 3.0            | 3.0                           | 3.0           | 3.0           | 4.0           | 4.0           | 4.0            | 3.0           | 3.0             |

\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

CIC Research, Inc.

Figure 10  
**GENDER OF OVERSEAS VISITORS**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.



Table 13

**SEX AND AGE  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

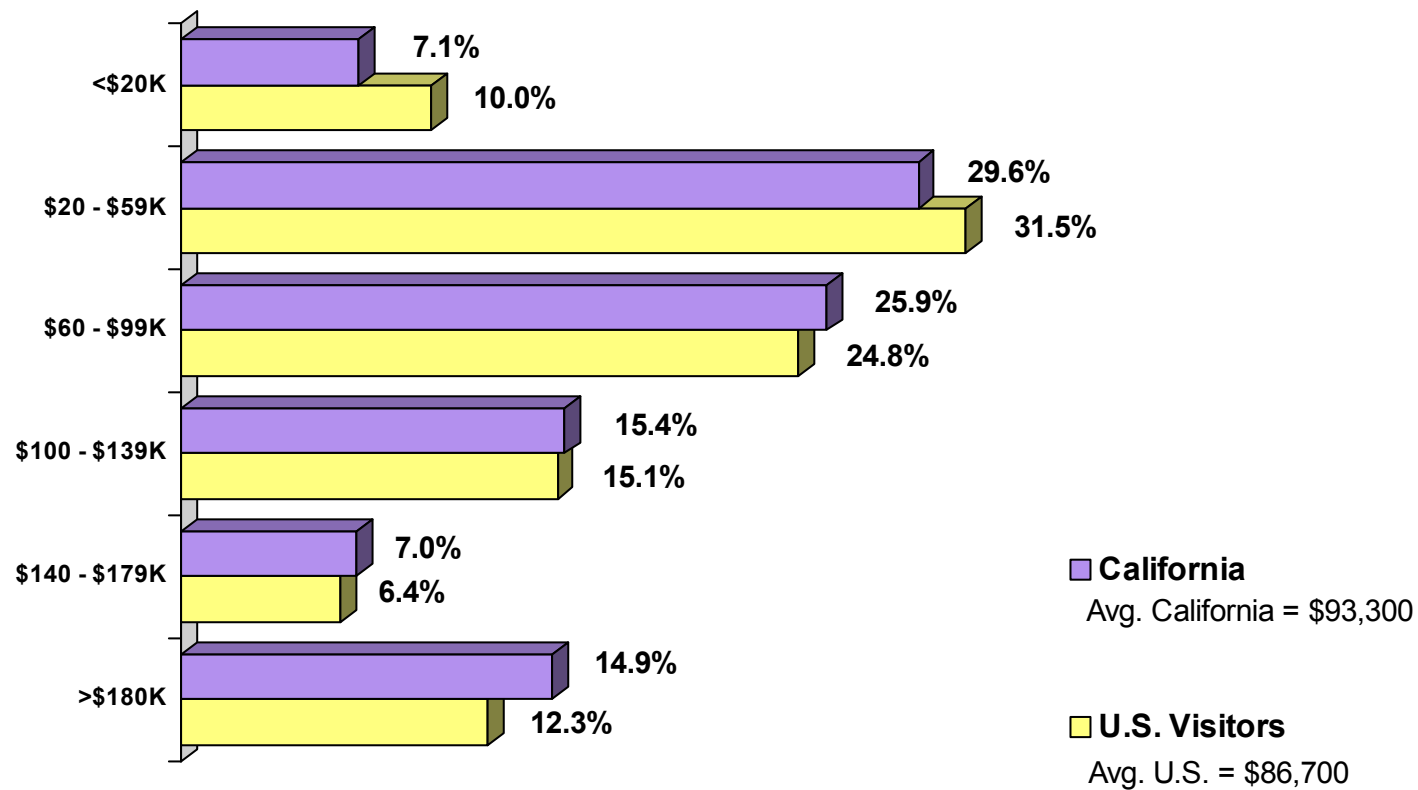
- Slightly more than six in ten (63%) travelers to California were adult males, and slightly less than four in ten (37%) were adult females. The average age of traveling adult males was 43 years, versus 41 years for traveling adult females.

| SEX AND AGE OF VISITOR*   | COUNTRY OF RESIDENCE OF VISITORS |              |              |                              |                 |              |              |              |              |                |              |                 |
|---------------------------|----------------------------------|--------------|--------------|------------------------------|-----------------|--------------|--------------|--------------|--------------|----------------|--------------|-----------------|
|                           | TOTAL<br>OVERSEAS                | U.K.         | GERMANY      | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA        | JAPAN        | MALAYSIA     | SINGAPORE    | SOUTH<br>KOREA | TAIWAN       | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS       | 4,791,000                        | 778,000      | 309,000      | 402,000                      | 146,000         | 98,000       | 722,000      | 28,000       | 65,000       | 252,000        | 191,000      | 496,000         |
| (Number of Respondents)   | (6,688)                          | (702)        | (222)        | (1,160)                      | (181)           | (167)        | (1,575)      | (209)        | (225)        | (242)          | (908)        | (160)           |
| <b>MALE ADULTS</b>        | <b>62.8%</b>                     | <b>54.3%</b> | <b>66.4%</b> | <b>51.8%</b>                 | <b>78.0%</b>    | <b>91.3%</b> | <b>73.0%</b> | <b>80.6%</b> | <b>66.8%</b> | <b>65.7%</b>   | <b>61.5%</b> | <b>53.5%</b>    |
| 18-24 Years               | 3.2                              | 3.7          | 4.5          | 3.3                          | 3.4             | 2.5          | 2.5          | 3.1          | 3.6          | 0.7            | 1.7          | 2.6             |
| 25 - 34 Years             | 13.8                             | 10.8         | 12.6         | 10.1                         | 27.3            | 40.7         | 12.1         | 17.5         | 16.4         | 17.1           | 15.5         | 8.4             |
| 35 - 54 Years             | 33.1                             | 26.0         | 35.0         | 27.2                         | 39.2            | 29.9         | 38.3         | 41.9         | 41.2         | 42.3           | 35.1         | 25.3            |
| 55 + Years                | 12.8                             | 13.9         | 14.3         | 11.1                         | 8.0             | 18.3         | 20.0         | 18.1         | 5.6          | 5.6            | 9.1          | 17.1            |
| <b>Average Male Age</b>   | <b>43.2</b>                      | <b>44.6</b>  | <b>43.9</b>  | <b>43.4</b>                  | <b>39.6</b>     | <b>40.5</b>  | <b>45.3</b>  | <b>43.5</b>  | <b>40.1</b>  | <b>41.8</b>    | <b>41.4</b>  | <b>46.5</b>     |
| <b>Median Male Age</b>    | <b>42.0</b>                      | <b>43.0</b>  | <b>44.0</b>  | <b>44.0</b>                  | <b>37.0</b>     | <b>35.0</b>  | <b>44.0</b>  | <b>44.0</b>  | <b>40.0</b>  | <b>41.0</b>    | <b>40.0</b>  | <b>48.0</b>     |
| <b>FEMALE ADULTS</b>      | <b>37.2%</b>                     | <b>45.7%</b> | <b>33.6%</b> | <b>48.2%</b>                 | <b>22.0%</b>    | <b>8.7%</b>  | <b>27.0%</b> | <b>19.4%</b> | <b>33.2%</b> | <b>34.3%</b>   | <b>38.5%</b> | <b>46.5%</b>    |
| 18-24 Years               | 5.3                              | 4.5          | 3.4          | 6.9                          | 1.2             | 0.9          | 3.0          | 0.3          | 4.9          | 4.8            | 4.3          | 3.4             |
| 25 - 34 Years             | 8.7                              | 9.8          | 8.9          | 7.9                          | 11.4            | 3.5          | 7.1          | 6.3          | 8.1          | 11.9           | 13.9         | 10.1            |
| 35 - 54 Years             | 16.5                             | 20.3         | 15.5         | 25.6                         | 7.8             | 3.8          | 10.9         | 11.9         | 19.3         | 15.5           | 16.3         | 27.7            |
| 55 + Years                | 6.6                              | 11.1         | 5.9          | 7.9                          | 1.7             | 0.5          | 6.0          | 1.0          | 0.9          | 2.1            | 3.9          | 5.2             |
| <b>Average Female Age</b> | <b>40.7</b>                      | <b>43.2</b>  | <b>40.8</b>  | <b>41.4</b>                  | <b>36.3</b>     | <b>38.4</b>  | <b>41.4</b>  | <b>39.3</b>  | <b>37.4</b>  | <b>35.7</b>    | <b>37.2</b>  | <b>38.8</b>     |
| <b>Median Female Age</b>  | <b>40.0</b>                      | <b>43.0</b>  | <b>41.0</b>  | <b>41.0</b>                  | <b>33.0</b>     | <b>33.0</b>  | <b>39.0</b>  | <b>40.0</b>  | <b>40.0</b>  | <b>35.0</b>    | <b>35.0</b>  | <b>37.0</b>     |

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 11**  
**INCOME PROFILE OF OVERSEAS VISITORS**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2005)



Source: ITA "In-Flight" Survey, 2005  
 CIC Research, Inc.

Table 14

**ANNUAL HOUSEHOLD INCOME  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

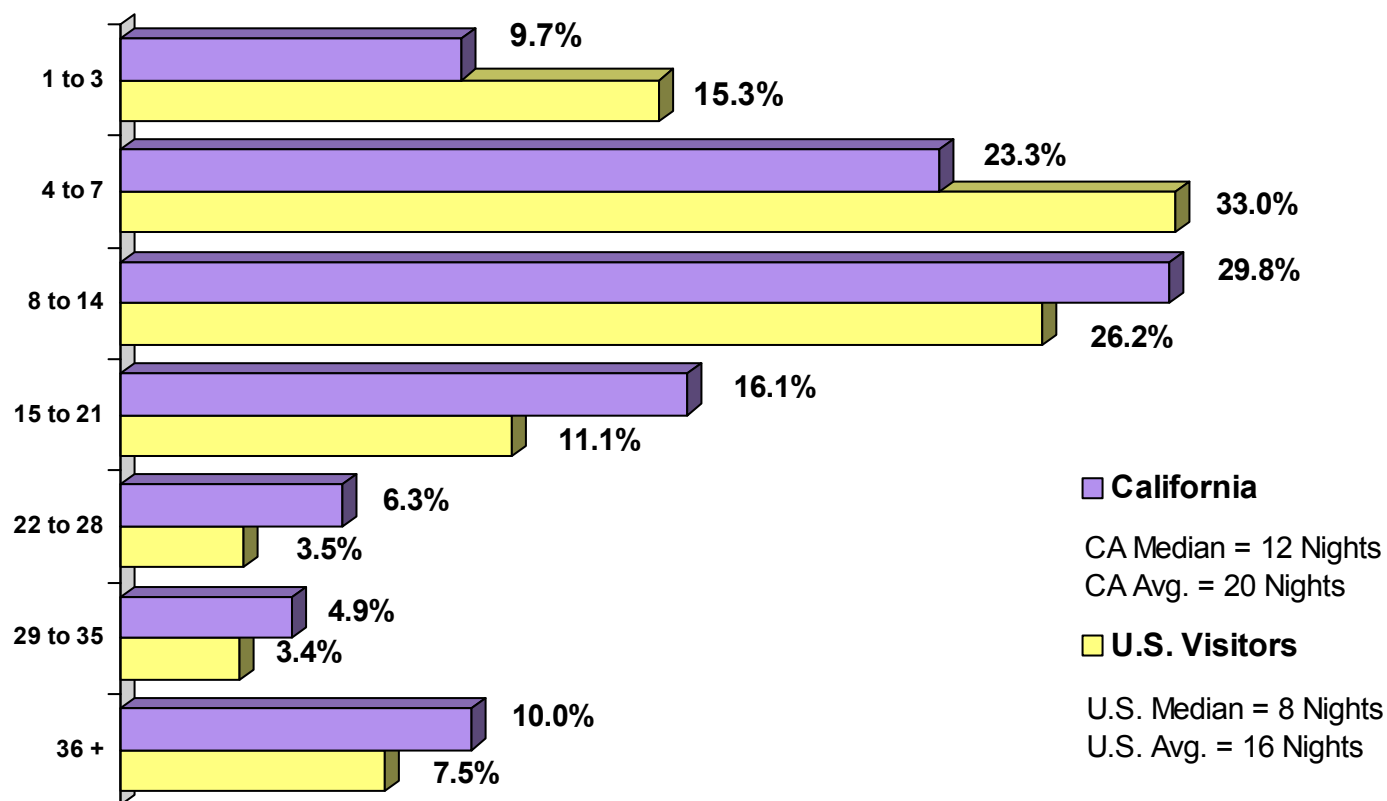
- The mean household income for overseas visitors to California was \$93,300 up from \$89,000 in 2004. During 2005, visitors from Japan (\$111,600) followed by visitors from the U.K. (\$108,200) reported the highest annual average income. Visitors from China reported the lowest annual household income at \$53,600 (caution, small sample size).

| ANNUAL HOUSEHOLD INCOME* | COUNTRY OF RESIDENCE OF VISITORS |               |               |                              |                 |               |               |               |               |                |               |                 |
|--------------------------|----------------------------------|---------------|---------------|------------------------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                          | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS      | 4,791,000                        | 778,000       | 309,000       | 402,000                      | 146,000         | 98,000        | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (NUMBER OF RESPONDENTS)  | (6,019)                          | (628)         | (182)         | (1,063)                      | (170)           | (145)         | (1,359)       | (204)         | (220)         | (229)          | (877)         | (139)           |
| Under \$20,000           | 7.1%                             | 1.9%          | 4.6%          | 4.0%                         | 30.9%           | 20.9%         | 3.3%          | 13.3%         | 11.9%         | 4.3%           | 6.3%          | 20.8%           |
| \$20,000 - \$59,999      | 29.6                             | 22.7          | 28.3          | 27.6                         | 43.7            | 42.7          | 18.1          | 35.5          | 20.7          | 37.8           | 41.4          | 45.5            |
| \$60,000 - \$99,999      | 25.9                             | 26.3          | 31.1          | 33.7                         | 8.4             | 18.1          | 30.9          | 24.4          | 21.4          | 38.3           | 26.1          | 6.0             |
| \$100,000 - \$139,999    | 15.4                             | 21.1          | 17.5          | 16.2                         | 3.9             | 11.2          | 16.8          | 18.3          | 17.5          | 15.5           | 12.3          | 10.2            |
| \$140,000 - \$179,999    | 7.0                              | 10.9          | 9.3           | 7.1                          | 5.3             | 3.5           | 9.7           | 1.7           | 6.4           | 1.5            | 4.6           | 5.7             |
| \$180,000 and over       | 14.9                             | 17.2          | 9.4           | 11.4                         | 8.0             | 3.6           | 21.1          | 6.8           | 22.2          | 2.6            | 9.3           | 11.8            |
| <b>TOTAL</b>             | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>                | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Average Annual Income    | \$93,300                         | \$108,200     | \$91,900      | \$92,000                     | \$53,600        | \$59,900      | \$111,600     | \$72,000      | \$102,600     | \$72,900       | \$77,900      | \$69,700        |
| Median Annual Income     | \$78,800                         | \$98,600      | \$85,400      | \$80,200                     | \$31,200        | \$46,600      | \$97,100      | \$61,300      | \$91,400      | \$67,100       | \$62,900      | \$39,800        |

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 12**  
**TOTAL NIGHTS IN THE U.S.**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 15

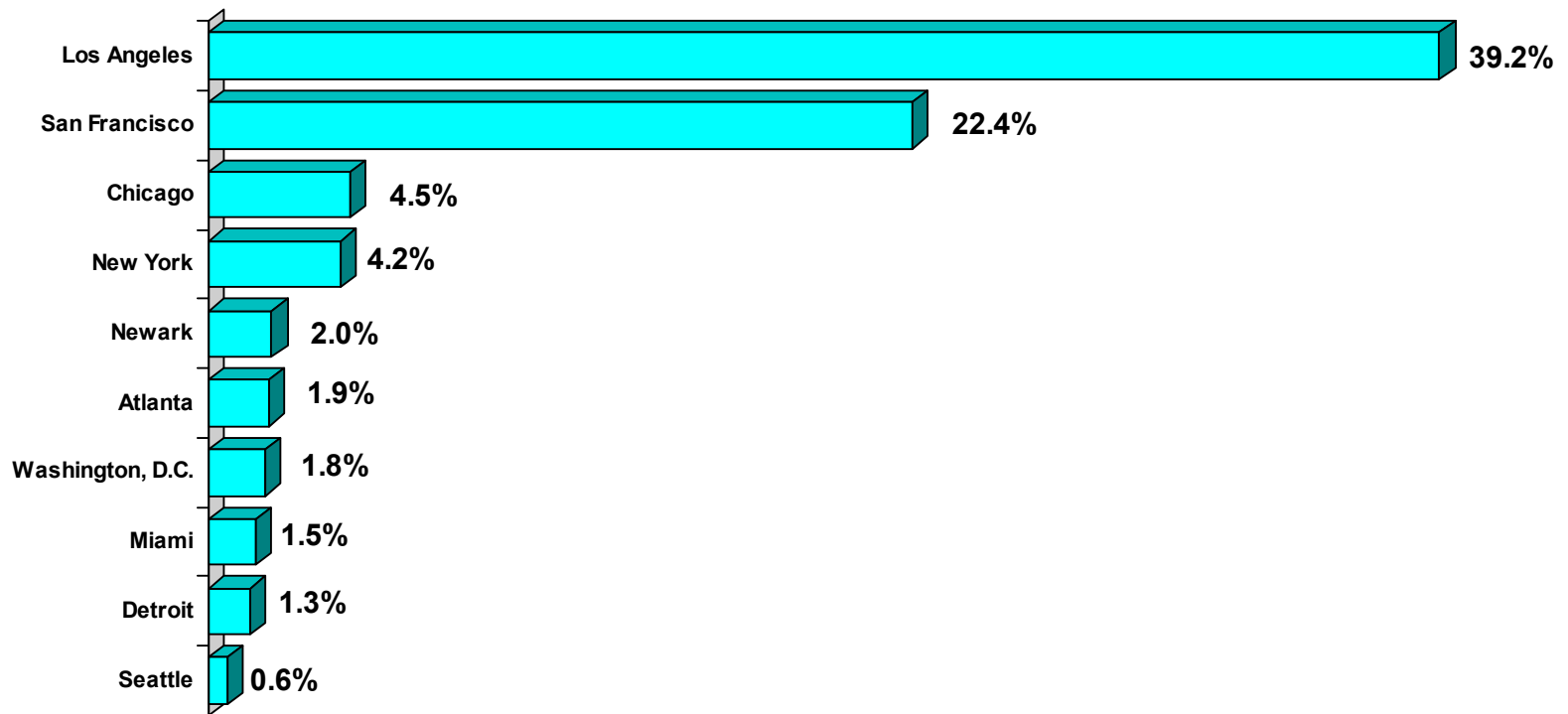
**NIGHTS AWAY FROM HOME  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- Overseas visitors to California stayed an average of 20 nights in the U.S. and 11 nights in California. Nationalities varied in their average length of U.S. trip. Visitors from Mexico and Japan spent the least amount of time in the U.S. (8 nights and 10 nights each respectively) as well as in California (6 nights and 7 nights each respectively.) Visitors from India spent the most time in the U.S. (53 nights) as well as in California (36 nights).

| NIGHTS IN U.S.              | COUNTRY OF RESIDENCE OF VISITORS |         |         |                              |                 |        |         |          |           |                |         |                 |
|-----------------------------|----------------------------------|---------|---------|------------------------------|-----------------|--------|---------|----------|-----------|----------------|---------|-----------------|
|                             | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN  | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS         | 4,791,000                        | 778,000 | 309,000 | 402,000                      | 146,000         | 98,000 | 722,000 | 28,000   | 65,000    | 252,000        | 191,000 | 496,000         |
| (Number of Respondents)     | (7,137)                          | (737)   | (235)   | (1,233)                      | (200)           | (175)  | (1,679) | (218)    | (239)     | (264)          | (967)   | (176)           |
| Average No. Nights          | 19.5                             | 15.0    | 24.3    | 22.9                         | 24.3            | 53.2   | 10.3    | 23.9     | 17.6      | 20.7           | 17.9    | 8.3             |
| Median No. Nights           | 12.0                             | 13.0    | 15.0    | 16.0                         | 13.0            | 24.0   | 5.0     | 12.0     | 10.0      | 10.0           | 10.0    | 7.0             |
| <b>NIGHTS IN CALIFORNIA</b> |                                  |         |         |                              |                 |        |         |          |           |                |         |                 |
| (Number of Respondents)     | (6,355)                          | (671)   | (208)   | (1,137)                      | (163)           | (139)  | (1,554) | (190)    | (224)     | (238)          | (819)   | (143)           |
| Average Nts. in Dest.       | 10.6                             | 7.3     | 14.4    | 8.9                          | 15.0            | 36.0   | 6.8     | 13.3     | 9.7       | 13.1           | 11.5    | 6.2             |
| Median Nts. in Dest.        | 6.0                              | 6.0     | 7.0     | 6.0                          | 6.0             | 10.0   | 4.0     | 6.0      | 7.0       | 6.0            | 6.0     | 4.0             |

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 13**  
**PORT OF ENTRY OF OVERSEAS VISITORS**  
OVERSEAS VISITORS TO CALIFORNIA  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 16

**PORT OF ENTRY  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

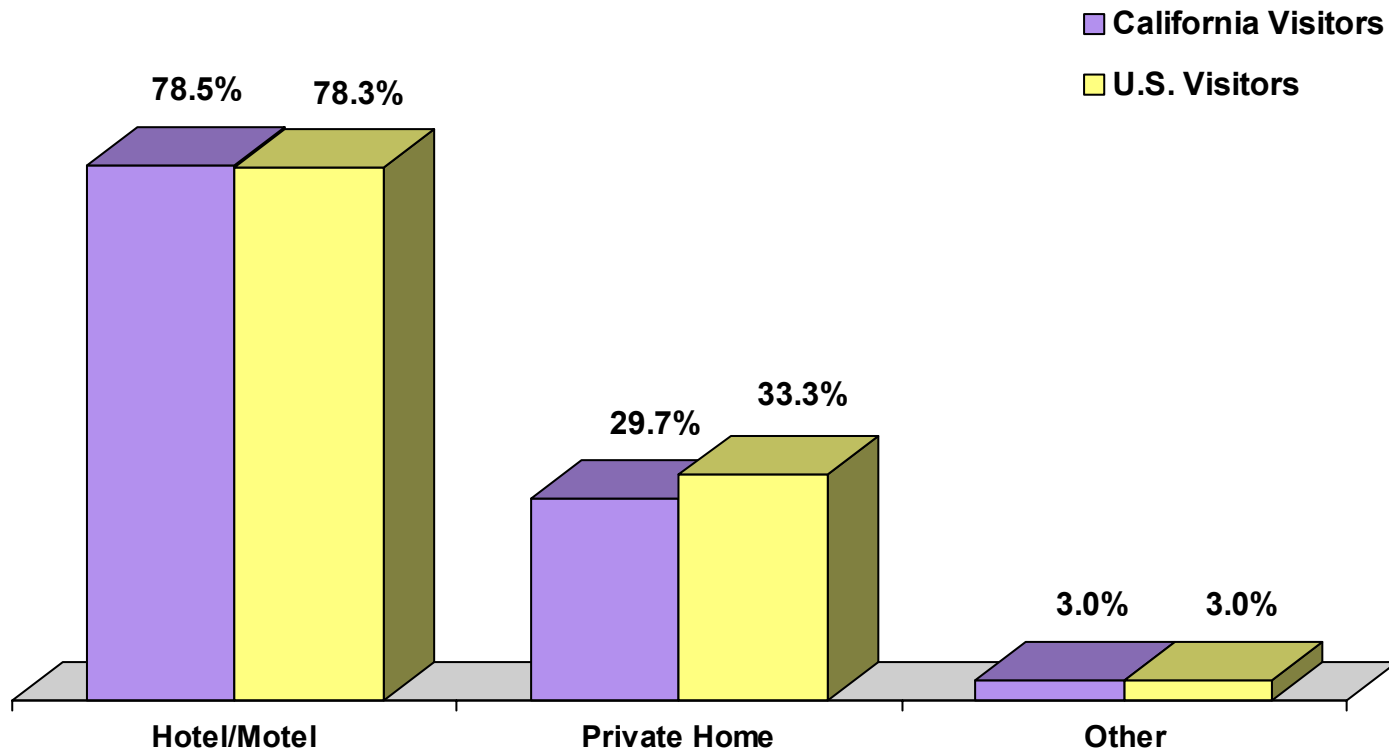
- A high ratio of California ports of entry is expected for overseas visitors to the State. Consistent with results in previous years, approximately six in ten (61%) California visitors reported U.S. entry either through Los Angeles (39%) or San Francisco (22%).

| PORT OF ENTRY*          | COUNTRY OF RESIDENCE OF VISITORS |                           |               |               |               |                 |               |               |               |                |               |                 |
|-------------------------|----------------------------------|---------------------------|---------------|---------------|---------------|-----------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                         | TOTAL<br>OVERSEAS                | AUSTRALIA/<br>NEW ZEALAND |               |               |               | CHINA<br>w/o HK |               |               |               | SOUTH<br>KOREA |               | MEXICO<br>(AIR) |
|                         |                                  | U.K.                      | GERMANY       | ZEALAND       |               | INDIA           | JAPAN         | MALAYSIA      | SINGAPORE     | TAIWAN         |               |                 |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000                   | 309,000       | 402,000       | 146,000       | 98,000          | 722,000       | 28,000        | 65,000        | 252,000        | 191,000       | 496,000         |
| (Number of Respondents) | (7,179)                          | (739)                     | (235)         | (1,234)       | (204)         | (178)           | (1,682)       | (218)         | (240)         | (266)          | (976)         | (190)           |
| Atlanta, GA             | 1.9%                             | 4.5%                      | 2.9%          | -             | -             | 1.5%            | 0.8%          | -             | 0.2%          | -              | -             | -               |
| Boston, MA              | 1.0                              | 1.4                       | 0.7           | 0.3           | 0.1           | 2.7             | -             | -             | 0.6           | -              | -             | -               |
| Chicago, IL             | 4.5                              | 8.4                       | 5.8           | 1.0           | 4.5           | -               | 3.0           | 2.9           | -             | 1.8            | -             | -               |
| Dallas/Ft. Worth, TX    | 0.9                              | 1.0                       | 1.0           | 0.2           | -             | 0.2             | 0.4           | 0.2           | -             | -              | 0.6           | 1.5             |
| Detroit, MI             | 1.3                              | -                         | -             | -             | -             | 0.9             | 6.8           | -             | 0.8           | 1.2            | -             | -               |
| Honolulu, HI            | 1.9                              | 0.3                       | -             | 11.7          | 5.3           | -               | 2.1           | -             | 1.1           | 4.3            | 0.8           | -               |
| Houston, TX             | 0.6                              | 0.3                       | 0.2           | 0.1           | -             | 1.4             | 0.1           | -             | 0.3           | -              | 0.3           | 1.3             |
| Los Angeles, CA         | 39.2                             | 33.7                      | 32.3          | 63.8          | 36.0          | 35.5            | 46.9          | 56.2          | 40.8          | 43.5           | 55.0          | 58.8            |
| Miami, FL               | 1.5                              | 0.9                       | 0.5           | 0.5           | -             | 0.3             | -             | 0.5           | -             | -              | 0.3           | -               |
| Minn./St. Paul, MN      | 0.1                              | -                         | -             | -             | 0.3           | 2.1             | -             | 0.6           | -             | -              | -             | -               |
| New York, NY            | 4.2                              | 3.5                       | 3.2           | 2.8           | 2.9           | 4.3             | 3.0           | 0.8           | 2.8           | 3.2            | 1.0           | -               |
| Newark, NJ              | 2.0                              | 3.1                       | 1.4           | 0.3           | -             | 7.0             | 0.5           | 0.9           | 5.5           | -              | 0.4           | -               |
| Orlando, FL             | 0.1                              | 0.3                       | -             | 0.1           | -             | -               | -             | 0.1           | -             | -              | -             | -               |
| Philadelphia, PA        | 0.6                              | 0.7                       | 3.6           | 0.1           | -             | -               | -             | -             | 0.1           | -              | -             | -               |
| Portland, OR            | 0.1                              | -                         | 0.5           | -             | -             | -               | 0.2           | -             | -             | -              | -             | -               |
| San Francisco, CA       | 22.4                             | 24.2                      | 28.7          | 13.6          | 39.3          | 38.6            | 26.7          | 24.1          | 33.7          | 30.8           | 29.3          | 11.4            |
| Seattle, WA             | 0.6                              | 0.1                       | -             | 0.1           | 0.5           | -               | 1.8           | -             | 0.4           | 0.2            | 1.7           | -               |
| Washington, DC          | 1.8                              | 1.5                       | 6.8           | 0.8           | -             | -               | 0.4           | -             | 0.4           | -              | -             | -               |
| Other                   | 15.6                             | 16.1                      | 12.3          | 4.6           | 11.1          | 5.4             | 7.3           | 13.7          | 13.2          | 15.1           | 10.7          | 26.9            |
| <b>TOTAL</b>            | <b>100.0%</b>                    | <b>100.0%</b>             | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |

\*Column percentages may not total to 100 percent due to rounding.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

Figure 14  
**OVERSEAS VISITORS' ACCOMMODATIONS**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.



Table 17

**ACCOMMODATIONS  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

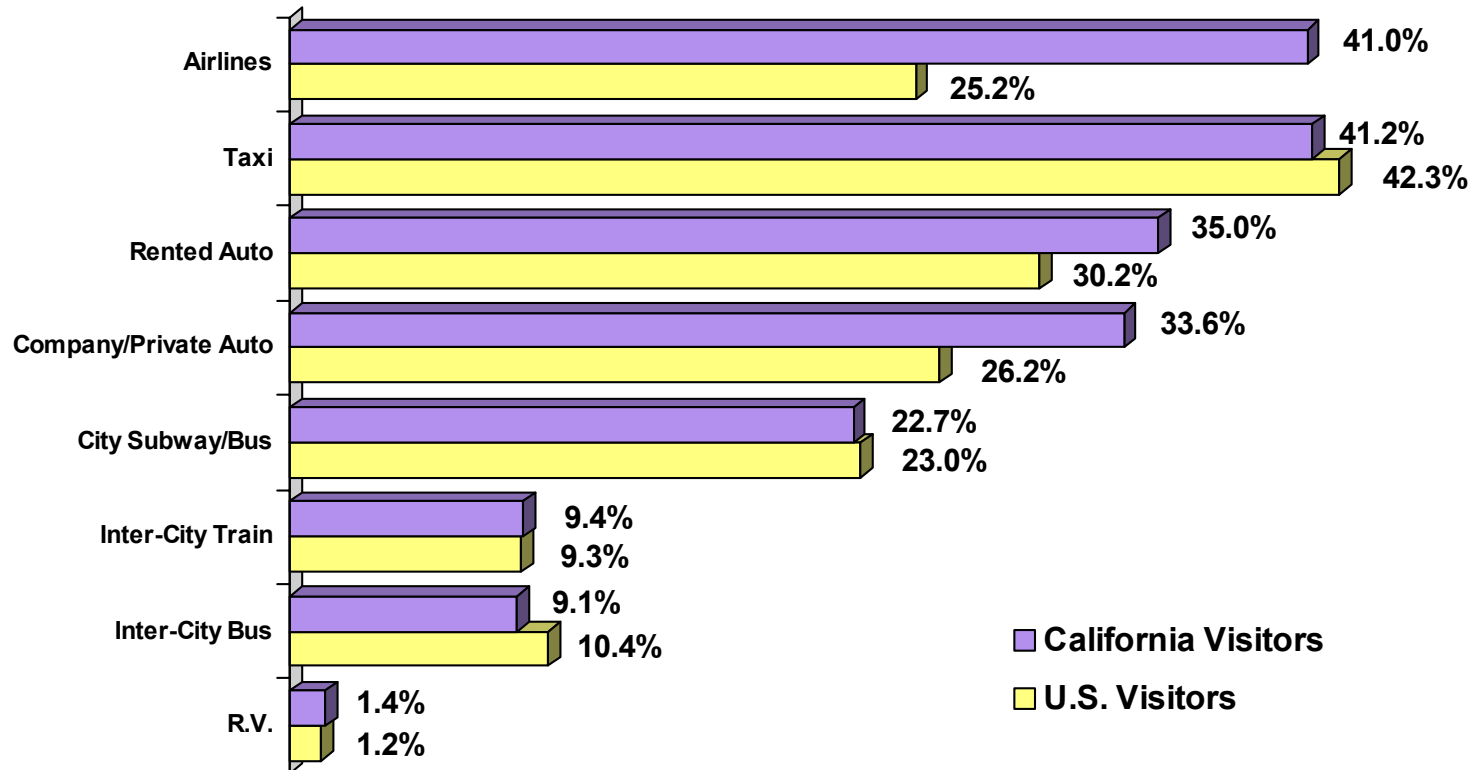
- Almost eight in ten (79%) California visitors chose to stay in a hotel/motel during their stay this year, similar to the 78% in 2004. Visitors from the U.K., Singapore, Malaysia, and Japan each reported over 87% of hotel usage. Visitors from India made the highest use of private homes (51%).

| TYPE OF ACOMMODATIONS*                         | COUNTRY OF RESIDENCE OF VISITORS |                  |                  |                              |                  |                 |                    |                 |                 |                  |                  |                  |
|--|----------------------------------|------------------|------------------|------------------------------|------------------|-----------------|--------------------|-----------------|-----------------|------------------|------------------|------------------|
|  | TOTAL<br>OVERSEAS                | U.K.             | GERMANY          | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK  | INDIA           | JAPAN              | MALAYSIA        | SINGAPORE       | SOUTH<br>KOREA   | TAIWAN           | MEXICO<br>(AIR)  |
| ESTIMATED TRAVELERS<br>(Number of Respondents) | 4,791,000<br>(6,048)             | 778,000<br>(654) | 309,000<br>(195) | 402,000<br>(1,091)           | 146,000<br>(148) | 98,000<br>(127) | 722,000<br>(1,488) | 28,000<br>(186) | 65,000<br>(217) | 252,000<br>(224) | 191,000<br>(759) | 496,000<br>(139) |
| <b>Hotel / Motel</b>                           | <b>78.5%</b>                     | <b>88.8%</b>     | <b>78.7%</b>     | <b>77.6%</b>                 | <b>71.1%</b>     | <b>52.8%</b>    | <b>87.2%</b>       | <b>87.4%</b>    | <b>87.8%</b>    | <b>68.8%</b>     | <b>64.2%</b>     | <b>76.1%</b>     |
| Average Nights in Dest.                        | 6.2                              | 5.6              | 7.1              | 6.0                          | 7.0              | 19.6            | 4.6                | 9.4             | 6.8             | 5.4              | 6.0              | 4.7              |
| Median Nights in Dest.                         | 4.0                              | 5.0              | 4.0              | 5.0                          | 5.0              | 6.0             | 4.0                | 5.0             | 5.0             | 4.0              | 4.0              | 4.0              |
| <b>Private Home</b>                            | <b>29.7%</b>                     | <b>22.9%</b>     | <b>36.2%</b>     | <b>30.1%</b>                 | <b>28.2%</b>     | <b>51.4%</b>    | <b>16.0%</b>       | <b>19.3%</b>    | <b>22.1%</b>    | <b>36.8%</b>     | <b>44.1%</b>     | <b>33.4%</b>     |
| Average Nights in Dest.                        | 17.8                             | 9.4              | 24.8             | 13.0                         | 26.4             | 43.5            | 16.7               | 16.4            | 13.0            | 23.6             | 17.2             | 7.4              |
| Median Nights in Dest.                         | 8.0                              | 8.0              | 9.0              | 7.0                          | 9.0              | 10.0            | 6.0                | 12.0            | 7.0             | 8.0              | 9.0              | 5.0              |
| <b>Other</b>                                   | <b>3.0%</b>                      | <b>1.7%</b>      | <b>4.6%</b>      | <b>2.5%</b>                  | <b>4.6%</b>      | <b>2.5%</b>     | <b>1.7%</b>        | <b>2.8%</b>     | <b>3.7%</b>     | <b>3.5%</b>      | <b>2.7%</b>      | <b>1.2%</b>      |

\*Column percentages may not total to 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

**Figure 15**  
**TRANSPORTATION WITHIN THE U.S.**  
 OVERSEAS VISITORS TO CALIFORNIA / U.S.  
 (2005)



Source: ITA "In-Flight" Survey, 2005  
 CIC Research, Inc.

Table 18

**TRANSPORTATION IN THE U.S.  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

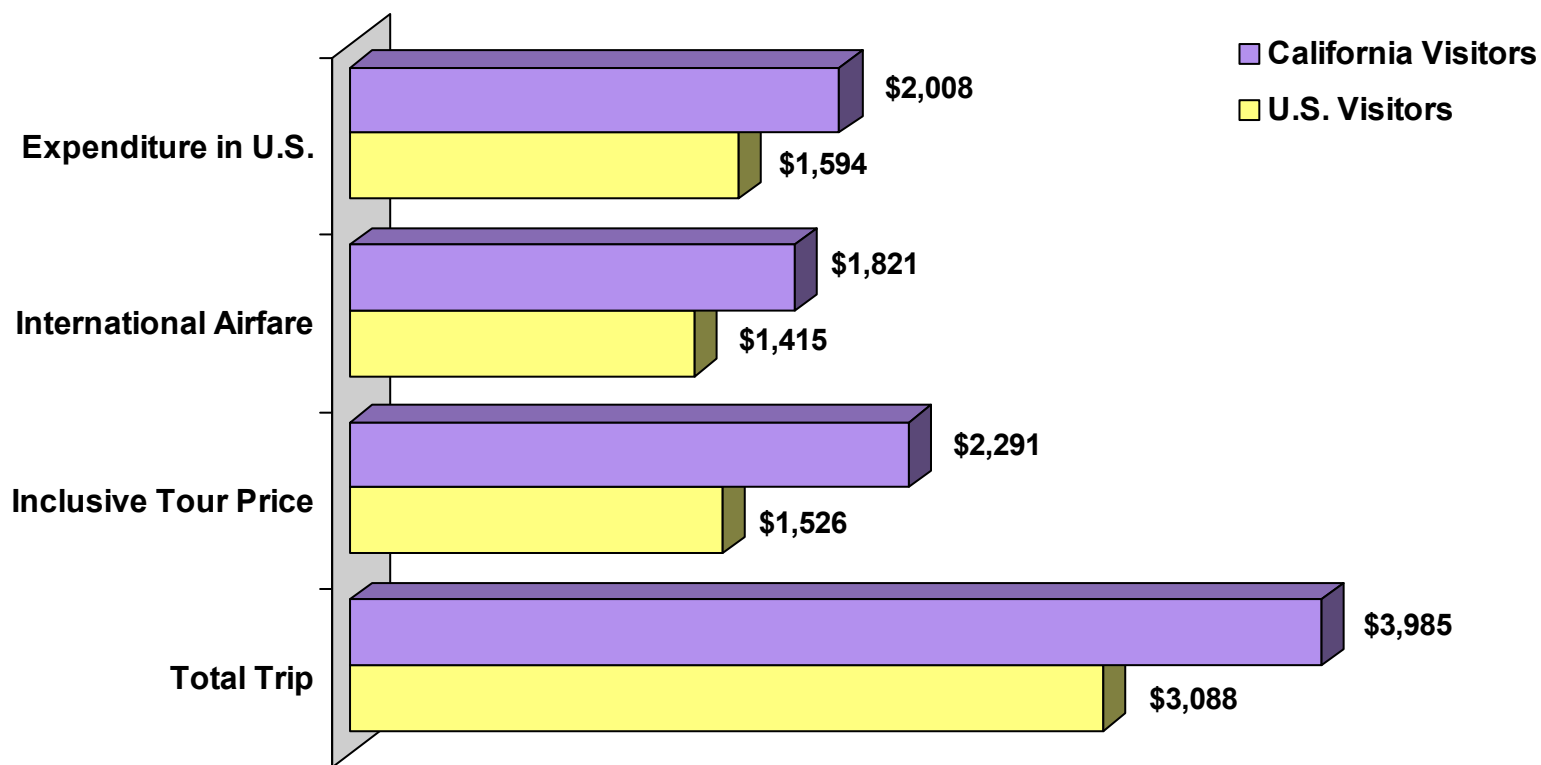
- Transportation in the U.S. used by visitors to California was predominantly taxi/cab/limousine (41%), airlines (41%), rented autos (35%), or company/private auto (34%).
- Visitors to California from Australia/New Zealand as well as those from India, were most likely to use airlines to travel around the U.S. (54% and 51 respectively). Visitors from Germany (50%) were most likely to rent an auto, while visitors from China (53%) and Taiwan (47%) were most likely to use a company or private auto.

| TRANSPORTATION IN U.S.* | COUNTRY OF RESIDENCE OF VISITORS |         |         |         |         |        |         |          |           |         |         |         |
|-------------------------|----------------------------------|---------|---------|---------|---------|--------|---------|----------|-----------|---------|---------|---------|
|                         | AUSTRALIA/                       |         |         |         |         |        |         |          |           |         |         | MEXICO  |
|                         | TOTAL                            | U.K.    | GERMANY | NEW     | CHINA   | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH   | TAIWAN  |         |
|                         | OVERSEAS                         |         |         | ZEALAND | w/o HK  |        |         |          |           | KOREA   |         | (AIR)   |
| ESTIMATED TRAVELERS     | 4,791,000                        | 778,000 | 309,000 | 402,000 | 146,000 | 98,000 | 722,000 | 28,000   | 65,000    | 252,000 | 191,000 | 496,000 |
| (Number of Respondents) | (6,637)                          | (691)   | (216)   | (1,122) | (183)   | (155)  | (1,623) | (208)    | (228)     | (256)   | (907)   | (148)   |
| Taxi/Cab/Limousine      | 41.2%                            | 51.5%   | 26.8%   | 50.6%   | 35.6%   | 51.7%  | 50.6%   | 43.5%    | 54.1%     | 36.6%   | 22.2%   | 33.7%   |
| Airlines in U.S.        | 41.0                             | 36.6    | 37.1    | 54.4    | 47.0    | 50.5   | 37.9    | 44.0     | 31.3      | 42.9    | 34.7    | 31.8    |
| Rented Auto             | 35.0                             | 36.0    | 50.1    | 30.9    | 35.9    | 26.7   | 30.2    | 41.1     | 34.7      | 35.5    | 37.1    | 41.0    |
| Company or Private Auto | 33.6                             | 25.5    | 32.5    | 35.5    | 52.5    | 14.6   | 39.7    | 25.2     | 23.7      | 36.0    | 47.1    | 26.9    |
| City Subway/Tram/Bus    | 22.7                             | 29.2    | 20.7    | 34.0    | 18.9    | 16.1   | 19.2    | 14.2     | 14.7      | 19.3    | 16.4    | 9.7     |
| Railroad between Cities | 9.4                              | 8.1     | 11.1    | 14.4    | 7.6     | 18.0   | 7.0     | 8.7      | 4.1       | 6.7     | 6.0     | 6.3     |
| Bus between Cities      | 9.1                              | 10.7    | 5.7     | 13.6    | 7.3     | 6.3    | 5.9     | 8.0      | 10.1      | 11.4    | 10.3    | 4.0     |
| Motor Home/Camper       | 1.4                              | 1.3     | 2.6     | 1.5     | 1.3     | 5.7    | 0.4     | 2.1      | 1.1       | 0.7     | 2.4     | -       |

\*Column percentages may not total to 100 percent due to multiple responses.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

Figure 16  
**TRIP EXPENDITURES**  
OVERSEAS VISITORS TO CALIFORNIA / U.S.  
(2005)



Source: ITA "In-Flight" Survey, 2005  
CIC Research, Inc.

Table 19

**EXPENDITURES  
OVERSEAS AND MEXICAN VISITORS TO CALIFORNIA  
(2005)**

- Overseas visitors to California reported spending approximately \$3,985 per capita on their entire trip away from home, up six percent from \$3,751 in 2004. Visitors from Australia/New Zealand recorded the highest total trip spending (\$5,030), followed by visitors from India (\$4,918).

| COUNTRY OF RESIDENCE OF VISITORS    |           |                                      |         |         |         |         |         |          |           |         |         |         |
|-------------------------------------|-----------|--------------------------------------|---------|---------|---------|---------|---------|----------|-----------|---------|---------|---------|
| AVERAGE PER VISITOR TRIP            | TOTAL     | AUSTRALIA/<br>NEW CHINA SOUTH MEXICO |         |         |         |         |         |          |           |         |         |         |
| EXPENDITURES                        | OVERSEAS  | U.K.                                 | GERMANY | ZEALAND | w/o HK  | INDIA   | JAPAN   | MALAYSIA | SINGAPORE | KOREA   | TAIWAN  | (AIR)   |
| ESTIMATED TRAVELERS                 | 4,791,000 | 778,000                              | 309,000 | 402,000 | 146,000 | 98,000  | 722,000 | 28,000   | 65,000    | 252,000 | 191,000 | 496,000 |
| TOTAL TRIP                          | \$3,985   | \$2,998                              | \$3,866 | \$5,030 | \$4,022 | \$4,918 | \$4,494 | \$4,692  | \$4,592   | \$3,510 | \$3,664 | \$2,691 |
| (Number of Respondents)             | (3,908)   | (401)                                | (144)   | (797)   | (92)    | (81)    | (903)   | (115)    | (140)     | (121)   | (499)   | (80)    |
| INCLUSIVE TOUR PRICE                | \$2,291   | \$2,172                              | \$2,610 | \$3,161 | \$3,822 | \$4,993 | \$2,011 | \$2,997  | \$1,846   | \$1,483 | \$1,707 | \$3,674 |
| (Number of Respondents)             | (804)     | (144)                                | (43)**  | (154)   | (21)**  | (5)**   | (202)   | (10)**   | (15)**    | (19)**  | (81)**  | (14)**  |
| INTERNATIONAL AIRFARE               | \$1,821   | \$1,345                              | \$1,664 | \$2,340 | \$1,411 | \$1,776 | \$2,626 | \$2,168  | \$2,308   | \$1,456 | \$1,414 | \$1,009 |
| (Number of Respondents)             | (4,593)   | (448)                                | (154)   | (929)   | (124)   | (104)   | (971)   | (137)    | (155)     | (156)   | (617)   | (113)   |
| EXPENDITURE IN U.S.*                | \$2,008   | \$1,559                              | \$1,959 | \$2,449 | \$2,335 | \$3,034 | \$1,810 | \$2,821  | \$2,298   | \$2,089 | \$2,144 | \$1,449 |
| (Per Day)                           | \$103     | \$104                                | \$81    | \$107   | \$96    | \$57    | \$176   | \$118    | \$131     | \$101   | \$120   | \$175   |
| (Number of Respondents)             | (4,873)   | (483)                                | (165)   | (902)   | (118)   | (110)   | (1,171) | (153)    | (186)     | (174)   | (656)   | (95)**  |
| MEAN ITEMIZED EXPENDITURES IN U.S.* |           |                                      |         |         |         |         |         |          |           |         |         |         |
| (Number of Respondents)             | (4,873)   | (483)                                | (165)   | (902)   | (118)   | (110)   | (1,171) | (153)    | (186)     | (174)   | (656)   | (95)**  |
| TRANSPORT IN U.S.                   | \$307     | \$237                                | \$244   | \$331   | \$452   | \$491   | \$231   | \$471    | \$456     | \$526   | \$398   | \$207   |
| LODGING IN U.S.                     | \$581     | \$454                                | \$666   | \$656   | \$628   | \$1269  | \$654   | \$1045   | \$623     | \$517   | \$490   | \$391   |
| FOOD, BEVERAGES                     | \$413     | \$391                                | \$483   | \$454   | \$331   | \$583   | \$408   | \$511    | \$487     | \$316   | \$364   | \$275   |
| GIFTS, SOUVENIRS                    | \$346     | \$220                                | \$238   | \$491   | \$496   | \$342   | \$273   | \$455    | \$382     | \$355   | \$542   | \$275   |
| ENTERTAINMENT                       | \$184     | \$182                                | \$163   | \$366   | \$172   | \$202   | \$102   | \$178    | \$211     | \$138   | \$194   | \$143   |
| OTHER                               | \$143     | \$51                                 | \$142   | \$127   | \$198   | \$127   | \$99    | \$129    | \$109     | \$178   | \$109   | \$126   |
| AVERAGE NIGHTS IN U.S.              | 19.5      | 15.0                                 | 24.3    | 22.9    | 24.3    | 53.2    | 10.3    | 23.9     | 17.6      | 20.7    | 17.9    | 8.3     |
| AVERAGE NIGHTS IN CALIF.            | 10.6      | 7.3                                  | 14.4    | 8.9     | 15.0    | 36.0    | 6.8     | 13.3     | 9.7       | 13.1    | 11.5    | 6.2     |
| MEDIAN NIGHTS IN CALIFORNIA         | 6.0       | 6.0                                  | 7.0     | 6.0     | 6.0     | 10.0    | 4.0     | 6.0      | 7.0       | 6.0     | 6.0     | 4.0     |

\*Overseas visitors on exclusive tour packages were excluded.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
CIC Research, Inc.

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Table 20

**EXPENDITURES**  
**OVERSEAS AND MEXICAN VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS\***  
**(2005)**

- Visitors who only visited California during their U.S. trip reported spending \$3,366 per capita on their entire trip away from home, up almost five percent from \$3,209 per visitor in 2004. Almost half of their total trip expenditures were in California (\$1,601).
- Average daily California expenses for California-only visitors were \$102 per day, up from \$88 per day in 2004. Average daily expenditures in the U.S. for all overseas visitors to California was \$103.

| <u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>       | <u>ALL CALIFORNIA-ONLY VISITORS</u> |
|--|-------------------------------------|
| TOTAL TRIP   | \$3,366                             |
| (NUMBER OF RESPONDENTS)                            | (1,794)                             |
| INCLUSIVE TOUR PRICE                               | \$2,360                             |
| (NUMBER OF RESPONDENTS)                            | (247)                               |
| INTERNATIONAL AIRFARE                              | \$1,700                             |
| (NUMBER OF RESPONDENTS)                            | (2,171)                             |
| EXPENDITURE IN CALIFORNIA                          | \$1,601                             |
| PER DAY  | \$102                               |
| (NUMBER OF RESPONDENTS)                            | (2,348)                             |
| <u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u> |                                     |
| (NUMBER OF RESPONDENTS)                            | (2,348)                             |
| TRANSPORT IN U.S.                                  | \$214                               |
| LODGING  | \$474                               |
| FOOD, BEVERAGES                                    | \$313                               |
| GIFTS, SOUVENIRS                                   | \$304                               |
| ENTERTAINMENT                                      | \$113                               |
| OTHER  | \$149                               |
| <u>AVERAGE NIGHTS IN CALIFORNIA</u>                | 13.7                                |

\*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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**OVERSEAS AND MEXICAN LEISURE VISITORS  
TO CALIFORNIA<sup>2</sup>  
(2005)**

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<sup>2</sup> Leisure visitors were defined as those visitors whose main purpose of trip was vacation/holidays or visiting friends and relatives.

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**Table 21**  
**RESIDENCE OF OVERSEAS AND MEXICAN LEISURE VISITORS TO THE UNITED STATES AND CALIFORNIA**  
**(2005)**

| Residence of Visitors | UNITED STATES                                   |  | CALIFORNIA  |  |   |
|-----------------------|---|--|---|--|---|
|                       | Estimated<br>Leisure<br>Visitors<br>To The U.S. | Percent Of<br>All Leisure<br>Visitors<br>To The U.S. | Estimated<br>Leisure<br>Visitors<br>To California | Percent Of<br>All Leisure<br>Visitors<br>To California | California<br>Share Of<br>Visitors From<br>This Country |
| <b>EUROPE</b>         | <b>7,568,000</b>                                | <b>50.1%</b>   | <b>1,514,000</b>                                  | <b>51.7%</b>   | <b>20.0%</b>  |
| W. EUROPE             | 7,290,000                                       | 48.3%  | 1,473,000   | 50.3%  | 20.2%   |
| Austria               | 78,000  | 0.5%   | 19,000  | 0.6%   | 24.9%   |
| Belgium               | 91,000  | 0.6%   | 19,000  | 0.6%   | 20.6%   |
| Denmark               | 107,000   | 0.7%   | 12,000  | 0.4%   | 10.8%   |
| France                | 581,000   | 3.8%   | 191,000   | 6.5%   | 32.9%   |
| Germany               | 873,000   | 5.8%   | 186,000   | 6.3%   | 21.3%   |
| Ireland               | 330,000   | 2.2%   | 83,000  | 2.8%   | 25.1%   |
| Italy                 | 349,000   | 2.3%   | 69,000  | 2.4%   | 19.8%   |
| Netherlands           | 307,000   | 2.0%   | 102,000   | 3.5%   | 33.2%   |
| Norway                | 113,000   | 0.8%   | 31,000  | 1.1%   | 27.5%   |
| Spain                 | 292,000   | 1.9%   | 31,000  | 1.1%   | 10.7%   |
| Sweden                | 205,000   | 1.4%   | 28,000  | 1.0%   | 13.5%   |
| Switzerland           | 145,000   | 1.0%   | 32,000  | 1.1%   | 22.2%   |
| United Kingdom        | 3,598,000                                       | 23.8%  | 630,000   | 21.5%  | 17.5%   |
| Other Western Europe  | 221,000   | 1.5%   | 40,000  | 1.4%   | 17.0%   |
| E. EUROPE             | 255,000   | 1.7%   | 45,000  | 1.5%   | 17.5%   |
| <b>CARIBBEAN</b>      | <b>752,000</b>                                  | <b>5.0%</b>  | <b>22,000</b>                                     | <b>0.8%</b>  | <b>2.9%</b>   |
| Trinidad & Tobago     | 89,000  | 0.6%   | 2,000   | 0.1%   | 2.0%  |
| Dominican Republic    | 201,000   | 1.3%   | 9,000   | 0.3%   | 4.3%  |

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Table 21 (continued)

| Residence of Visitors                   | UNITED STATES                                   |  | CALIFORNIA  |  |   |
|---|---|--|---|--|---|
|   | Estimated<br>Leisure<br>Visitors<br>To The U.S. | Percent Of<br>All Leisure<br>Visitors<br>To The U.S. | Estimated<br>Leisure<br>Visitors<br>To California | Percent Of<br>All Leisure<br>Visitors<br>To California | California<br>Share Of<br>Visitors From<br>This Country |
| <b>SOUTH AMERICA</b>                    | <b>1,159,000</b>                                | <b>7.7%</b>  | <b>92,000</b>                                     | <b>3.1%</b>  | <b>7.9%</b>   |
| Argentina                               | 140,000   | 0.9%   | 6,000   | 0.2%   | 4.5%  |
| Brazil                                  | 235,000   | 1.6%   | 25,000  | 0.9%   | 10.7%   |
| Chile                                   | 59,000  | 0.4%   | 1,000   | 0.0%   | 1.1%  |
| Colombia                                | 261,000   | 1.7%   | 7,000   | 0.2%   | 2.7%  |
| Ecuador                                 | 85,000  | 0.6%   | 34,000  | 1.2%   | 39.9%   |
| Peru                                    | 103,000   | 0.7%   | 15,000  | 0.5%   | 14.7%   |
| Venezuela                               | 238,000   | 1.6%   | 1,000   | 0.0%   | 0.6%  |
| Other South America                     | 38,000  | 0.2%   | 3,000   | 0.1%   | 4.6%  |
| <b>CENTRAL AMERICA (Excl'd. Mexico)</b> | <b>445,000</b>                                  | <b>2.9%</b>  | <b>78,000</b>                                     | <b>2.7%</b>  | <b>17.5%</b>  |
| Costa Rica                              | 87,000  | 0.6%   | 9,000   | 0.3%   | 10.3%   |
| Guatemala                               | 98,000  | 0.6%   | 31,000  | 1.1%   | 31.5%   |
| Panama                                  | 57,000  | 0.4%   | 23,000  | 0.8%   | 40.4%   |
| Other Central America                   | 121,000   | 0.8%   | 15,000  | 0.5%   | 12.2%   |
| Mexico (Air Travelers Only)             | 1,091,000                                       | N.A.   | 381,000   | N.A.   | 34.9%   |
| <b>AFRICA</b>                           | <b>136,000</b>                                  | <b>0.9%</b>  | <b>12,000</b>                                     | <b>0.4%</b>  | <b>8.9%</b>   |
| South Africa, Rep. of                   | 39,000  | 0.3%   | 7,000   | 0.2%   | 19.2%   |
| <b>OCEANIA</b>                          | <b>517,000</b>                                  | <b>3.4%</b>  | <b>289,000</b>                                    | <b>9.9%</b>  | <b>55.8%</b>  |
| Australia                               | 417,000   | 2.8%   | 227,000   | 7.7%   | 54.3%   |
| New Zealand                             | 91,000  | 0.6%   | 60,000  | 2.0%   | 66.3%   |
| Other Oceania                           | 9,000   | 0.0%   | 2,000   | 11.2%  | 19.1%   |

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Table 21 (continued)

| Residence of Visitors   | UNITED STATES                                   |  | CALIFORNIA  |  |   |
|---|---|--|---|--|---|
|   | Estimated<br>Leisure<br>Visitors<br>To The U.S. | Percent Of<br>All Leisure<br>Visitors<br>To The U.S. | Estimated<br>Leisure<br>Visitors<br>To California | Percent Of<br>All Leisure<br>Visitors<br>To California | California<br>Share Of<br>Visitors From<br>This Country |
| <b>FAR EAST</b>   | <b>4,195,000</b>                                | <b>27.8%</b>   | <b>868,000</b>                                    | <b>29.6%</b>   | <b>20.7%</b>  |
| Hong Kong   | 64,000  | 0.4%   | 42,000  | 1.4%   | 65.2%   |
| India   | 135,000   | 0.9%   | 25,000  | 0.9%   | 18.3%   |
| Indonesia   | 31,000  | 0.2%   | 22,000  | 0.8%   | 71.7%   |
| Japan   | 3,030,000                                       | 20.1%  | 327,000   | 11.2%  | 10.8%   |
| Korea, South  | 354,000   | 2.3%   | 128,000   | 4.4%   | 36.3%   |
| Malaysia  | 18,000  | 0.1%   | 10,000  | 0.3%   | 55.9%   |
| People's Republic of China  | 69,000  | 0.5%   | 44,000  | 1.5%   | 62.9%   |
| Philippines   | 128,000   | 0.8%   | 98,000  | 3.3%   | 76.8%   |
| Republic of China*  | 153,000   | 1.0%   | 94,000  | 3.2%   | 61.2%   |
| Singapore   | 49,000  | 0.3%   | 33,000  | 1.1%   | 66.7%   |
| Thailand  | 36,000  | 0.2%   | 21,000  | 0.7%   | 57.6%   |
| Other Far East  | 128,000   | 1.0%   | 24,000  | 0.8%   | 18.2%   |
| <b>MIDDLE EAST</b>  | <b>354,000</b>                                  | <b>2.3%</b>  | <b>58,000</b>                                     | <b>2.0%</b>  | <b>16.5%</b>  |
| Israel  | 224,000   | 1.5%   | 35,000  | 1.2%   | 15.7%   |
| Saudi Arabia  | 15,000  | 0.1%   | 3,000   | 0.1%   | 22.4%   |
| Turkey  | 42,000  | 0.3%   | 3,000   | 0.1%   | 6.5%  |
| Other Middle East   | 73,000  | 0.5%   | 17,000  | 0.5%   | 22.5%   |
| <b>Total Overseas Leisure Visitors</b><br>(Number of Respondents) | <b>15,103,000</b><br>(15,519)                   | <b>100.0%</b>  | <b>2,930,000</b><br>(3,710)                       | <b>100.0%</b>  | <b>19.4%</b>  |

\* Countries and World Region visitor volumes are independantly estimated and may not sum to total visitors.

Source: ITA Survey of International Air Travelers, 2005.

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Table 22

**MAIN DESTINATION BY STATE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- California was the main U.S. state destination for almost three-quarters (73%) of overseas leisure travelers to California in 2005, similar to the proportion from previous years. The highest proportion of leisure travelers, whose main destination was California, were from Malaysia (88%) and Mexico (88%), followed by China, Singapore and Taiwan (85% each respectively\*\*). Australia/New Zealand (47%) reported the lowest proportion of leisure travelers with California as their main destination.

| MAIN DESTINATION*       | COUNTRY OF RESIDENCE OF VISITORS |              |              |                   |              |              |              |              |              |              |              |              |
|-------------------------|----------------------------------|--------------|--------------|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                         | TOTAL                            |              |              | AUSTRALIA/<br>NEW | CHINA        |              |              |              |              | SOUTH        |              | MEXICO       |
|                         | OVERSEAS                         | U.K.         | GERMANY      | ZEALAND           | w/o HK       | INDIA        | JAPAN        | MALAYSIA     | SINGAPORE    | KOREA        | TAIWAN       | (AIR)        |
| ESTIMATED TRAVELERS     | 2,930,000                        | 630,000      | 186,000      | 287,000           | 44,000       | 25,000       | 327,000      | 10,000       | 33,000       | 128,000      | 94,000       | 381,000      |
| (Number of Respondents) | (2,680)                          | (411)        | (97)**       | (503)             | (37)**       | (31)**       | (599)        | (45)**       | (65)**       | (88)**       | (306)        | (114)        |
| <b>California</b>       | <b>73.0%</b>                     | <b>68.9%</b> | <b>76.0%</b> | <b>46.6%</b>      | <b>85.3%</b> | <b>74.8%</b> | <b>81.8%</b> | <b>87.9%</b> | <b>85.1%</b> | <b>77.9%</b> | <b>84.8%</b> | <b>87.5%</b> |
| Nevada                  | 6.3                              | 8.5          | 1.7          | 2.5               | 1.0          | 5.6          | 8.0          | 1.4          | 4.1          | 1.3          | 1.4          | 1.2          |
| Hawaiian Islands        | 3.7                              | 7.2          | 7.5          | 1.8               | -            | -            | 3.1          | 0.7          | -            | 2.3          | 2.2          | 2.7          |
| New York                | 3.7                              | 1.4          | 0.4          | 13.5              | 2.6          | 4.9          | 1.2          | 2.3          | 5.2          | 9.1          | 1.2          | -            |
| Florida                 | 1.6                              | 1.7          | -            | 2.1               | -            | -            | 0.5          | 1.5          | 1.0          | -            | -            | 0.1          |

\*Visitors may report only one destination -- States with less than 1% response were not listed.

\*\*Caution-Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 23

**PURPOSE OF TRIP  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Almost 80% of overseas leisure travelers to California reported they were on vacation/holiday, while 51% reported visiting friends or relatives. This is similar to results from previous years. Leisure travelers from Japan (87%) and Germany (86%), followed by those from Singapore, Malaysia\*\* and the U.K., (84% each respectively), recorded the highest proportion of travelers on vacation/holiday in 2005.
- A large proportion of visitors from India (93%)\*\* reported coming to California to visit friends and relatives, while only 38% of travelers from Singapore and 40% from the U.K., reported their purpose was to visit friends and relatives.

| PURPOSE OF TRIP*        | COUNTRY OF RESIDENCE OF VISITORS |         |         |                              |                 |        |         |          |           |                |        |                 |
|-------------------------|----------------------------------|---------|---------|------------------------------|-----------------|--------|---------|----------|-----------|----------------|--------|-----------------|
|                         | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS     | 2,930,000                        | 630,000 | 186,000 | 287,000                      | 44,000          | 25,000 | 327,000 | 10,000   | 33,000    | 128,000        | 94,000 | 381,000         |
| (Number of Respondents) | (3,710)                          | (558)   | (131)   | (759)                        | (46)**          | (41)** | (763)   | (58)**   | (102)     | (130)          | (420)  | (126)           |
| Vacation/ Holidays      | 79.9%                            | 84.1%   | 85.5%   | 81.5%                        | 50.7%           | 60.5%  | 87.4%   | 84.2%    | 84.3%     | 71.2%          | 74.1%  | 72.2%           |
| Visit Friends/Relatives | 51.4                             | 39.5    | 44.1    | 57.5                         | 72.3            | 93.0   | 42.3    | 72.8     | 37.8      | 73.4           | 77.4   | 50.9            |
| Business                | 4.7                              | 2.3     | 9.1     | 5.0                          | 4.0             | 8.7    | 3.3     | 3.5      | 6.0       | 4.7            | 4.2    | 0.5             |
| Attend Convention       | 2.3                              | 2.9     | 2.2     | 2.2                          | 14.1            | -      | 1.8     | 2.2      | 1.5       | 1.4            | 1.4    | 0.4             |
| Study                   | 1.8                              | 0.2     | 1.1     | 1.7                          | 4.0             | -      | 1.6     | 0.9      | 0.9       | 2.4            | 3.3    | 0.1             |
| Other                   | 1.6                              | 2.7     | 1.7     | 1.4                          | 0.0             | 2.4    | 1.1     | 0.0      | 0.5       | 0.2            | 2.5    | 0.5             |

\*Column percentages may total more than 100 percent due to multiple responses.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 24

**LEISURE-RECREATION ACTIVITIES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Overseas leisure visitors reported a greater participation rate in almost all activities, compared with all overseas visitors to California (Table 6). Shopping and dining followed by sightseeing in cities were the most common leisure and recreation activities of overseas leisure visitors to California.

| LEISURE/RECREATION<br>ACTIVITIES* | COUNTRY OF RESIDENCE OF VISITORS |         |         |                              |                 |        |         |          |           |                |        |                 |
|-----------------------------------|----------------------------------|---------|---------|------------------------------|-----------------|--------|---------|----------|-----------|----------------|--------|-----------------|
|                                   | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS               | 2,930,000                        | 630,000 | 186,000 | 287,000                      | 44,000          | 25,000 | 327,000 | 10,000   | 33,000    | 128,000        | 94,000 | 381,000         |
| (Number of Respondents)           | (3,536)                          | (538)   | (127)   | (718)                        | (43)**          | (33)** | (747)   | (58)**   | (98)**    | (122)          | (403)  | (104)           |
| Shopping                          | 92.1%                            | 92.0%   | 85.0%   | 94.3%                        | 88.5%           | 89.1%  | 93.8%   | 96.7%    | 97.8%     | 91.6%          | 93.7%  | 82.5%           |
| Dining in Restaurants             | 87.2                             | 94.7    | 86.8    | 90.7                         | 79.7            | 81.9   | 85.1    | 77.0     | 87.0      | 68.4           | 80.2   | 75.4            |
| Sightseeing in Cities             | 62.9                             | 69.7    | 53.8    | 68.3                         | 51.4            | 61.9   | 56.9    | 68.8     | 61.5      | 52.0           | 61.4   | 18.2            |
| Visit Historical Places           | 49.8                             | 54.8    | 63.2    | 67.3                         | 49.7            | 62.9   | 10.5    | 64.6     | 39.3      | 31.1           | 37.6   | 48.1            |
| Amusement/Theme Parks             | 47.6                             | 37.7    | 33.5    | 62.7                         | 41.5            | 38.9   | 46.3    | 72.7     | 71.2      | 59.1           | 53.0   | 32.1            |
| Visit National Parks              | 43.4                             | 50.7    | 63.6    | 35.1                         | 48.9            | 48.5   | 23.3    | 44.9     | 38.6      | 41.2           | 32.1   | 27.4            |
| Visit Small Towns                 | 43.4                             | 50.1    | 50.6    | 43.7                         | 25.2            | 9.4    | 33.7    | 51.8     | 25.0      | 23.8           | 27.6   | 44.3            |
| Touring Countryside               | 38.7                             | 48.7    | 60.8    | 43.9                         | 34.5            | 9.7    | 19.5    | 56.3     | 25.5      | 31.9           | 19.3   | 2.3             |
| Casinos/Gambling                  | 33.4                             | 39.3    | 28.5    | 36.4                         | 34.1            | 20.7   | 21.2    | 25.4     | 30.0      | 36.0           | 29.5   | 20.4            |
| Cultural Heritage Sites           | 29.0                             | 36.0    | 55.6    | 32.3                         | 16.9            | 16.8   | 10.0    | 38.8     | 12.9      | 37.1           | 21.4   | 11.9            |
| Guided Tours                      | 27.1                             | 40.9    | 26.8    | 42.0                         | 14.8            | 12.7   | 23.7    | 20.2     | 25.7      | 19.9           | 23.8   | 20.6            |
| Art Gallery/Museum                | 24.5                             | 22.4    | 27.8    | 41.5                         | 21.2            | 20.2   | 11.1    | 11.8     | 14.9      | 19.8           | 16.1   | 14.5            |
| Water Sports/Sunbathing           | 22.9                             | 35.4    | 33.3    | 27.3                         | 6.0             | 5.1    | 9.6     | 1.8      | 6.8       | 7.6            | 9.0    | 15.4            |
| Concert/Play/Musical              | 19.8                             | 21.6    | 16.8    | 32.6                         | 20.1            | 9.6    | 12.9    | 13.4     | 13.3      | 19.7           | 12.1   | 5.3             |
| Nightclubs/Dancing                | 13.1                             | 16.6    | 12.4    | 16.0                         | 4.7             | 6.2    | 7.1     | 5.9      | 4.1       | 7.2            | 6.2    | 16.8            |
| Visit Am. Indian Comm.            | 9.3                              | 9.4     | 16.5    | 8.9                          | 2.4             | 4.9    | 3.1     | 4.7      | 1.1       | 11.2           | 2.3    | 0.8             |
| Camping/Hiking                    | 8.7                              | 9.7     | 13.2    | 8.7                          | 4.7             | 1.3    | 4.3     | 2.4      | 5.4       | 4.0            | 4.6    | 5.7             |
| Ethnic Heritage Sites             | 8.4                              | 12.2    | 10.5    | 9.0                          | 1.7             | -      | 3.1     | 9.2      | 9.1       | 7.6            | 4.1    | 5.1             |
| Attend Sports Event               | 8.0                              | 7.7     | 6.7     | 16.7                         | 5.5             | 5.0    | 5.7     | -        | 1.2       | 9.6            | 5.1    | 2.4             |
| Cruises                           | 7.6                              | 6.8     | 6.5     | 15.6                         | 4.6             | 8.7    | 6.6     | 8.5      | 4.9       | 19.8           | 7.8    | 2.3             |
| Golfing/Tennis                    | 6.6                              | 4.9     | 2.4     | 7.4                          | 20.6            | 11.2   | 8.1     | 2.3      | 2.9       | 21.7           | 11.3   | 1.3             |
| Environ./Eco. Excursions          | 5.4                              | 4.6     | 2.3     | 7.7                          | 14.3            | 1.3    | 1.1     | -        | 4.1       | 4.5            | 7.9    | 4.1             |
| Ranch Vacations                   | 3.2                              | 4.7     | 0.4     | 2.5                          | -               | 1.3    | 1.0     | 1.2      | 0.7       | 1.6            | 3.4    | 0.7             |
| Snow Skiing                       | 3.0                              | 7.0     | 0.4     | 5.2                          | 0.6             | 1.3    | 0.5     | 2.2      | 6.7       | 0.3            | 2.4    | 7.7             |
| Hunting/Fishing                   | 1.5                              | 1.2     | 0.4     | 1.6                          | 3.2             | -      | 1.1     | -        | 4.0       | 3.7            | 1.3    | 0.4             |

\*Multiple response. Only responses greater than 1.0 percent are detailed.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 25

**ADVANCE TRIP DECISION  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Overseas leisure visitors to California reported a median advance trip decision period of 90 days, one month longer than the 60 days for all overseas visitors to California (Table 7). The median advance airline ticket reservation period for leisure visitors was 59 days in 2005 compared with 45 days in 2004.
- In 2005, leisure visitors from the U.K. reported the longest advance airline reservation time (90 days), compared to visitors from other countries. This result was the same as that in 2004.

| ADVANCE TRIP DECISION*                   | COUNTRY OF RESIDENCE OF VISITORS |               |               |                |                 |               |               |               |               |                |               |                 |
|--|----------------------------------|---------------|---------------|----------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|  | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS                      | 2,930,000                        | 630,000       | 186,000       | 287,000        | 44,000          | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents)                  | (3,524)                          | (528)         | (125)         | (739)          | (44)**          | (37)**        | (733)         | (54)**        | (95)**        | (127)          | (390)         | (115)           |
| 14 Days or Less                          | 8.1%                             | 3.7%          | 7.0%          | 5.3%           | 11.0%           | 6.9%          | 10.8%         | 6.6%          | 16.9%         | 10.3%          | 21.3%         | 14.1%           |
| 15 - 60 Days                             | 37.1                             | 22.7          | 26.5          | 25.3           | 61.1            | 68.9          | 58.8          | 42.3          | 50.0          | 70.7           | 59.1          | 60.4            |
| 61 - 120 Days                            | 22.8                             | 21.1          | 27.3          | 26.5           | 13.8            | 15.1          | 22.7          | 42.3          | 17.4          | 10.5           | 14.3          | 11.2            |
| 121 - 180 Days                           | 14.8                             | 20.8          | 16.4          | 18.6           | 6.7             | 9.0           | 4.4           | 7.6           | 13.2          | 5.3            | 3.4           | 9.1             |
| 181 Days or More                         | 17.1                             | 31.7          | 22.8          | 24.3           | 7.5             | -             | 3.3           | 1.2           | 2.5           | 3.2            | 2.0           | 5.1             |
| <b>TOTAL</b>                             | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Average No. of Days                      | 114.9                            | 159.8         | 130.6         | 150.7          | 67.4            | 56.6          | 65.0          | 80.6          | 67.1          | 59.6           | 50.1          | 59.0            |
| Median No. of Days                       | 90.0                             | 150.0         | 100.0         | 120.0          | 60.0            | 45.0          | 60.0          | 90.0          | 45.0          | 40.0           | 30.0          | 30.0            |
| <b>ADVANCE AIRLINE<br/>RESERVATIONS*</b> |                                  |               |               |                |                 |               |               |               |               |                |               |                 |
| ESTIMATED TRAVELERS                      | 2,930,000                        | 630,000       | 186,000       | 287,000        | 44,000          | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents)                  | (3,349)                          | (508)         | (123)         | (722)          | (40)**          | (36)**        | (658)         | (50)**        | (92)**        | (120)          | (378)         | (109)           |
| 14 Days or less                          | 18.0%                            | 7.3%          | 13.3%         | 10.7%          | 22.2%           | 25.0%         | 20.5%         | 11.2%         | 26.7%         | 38.5%          | 39.2%         | 38.8%           |
| 15 - 60 Days                             | 42.4                             | 29.3          | 36.2          | 40.1           | 69.3            | 63.1          | 65.8          | 55.1          | 54.1          | 54.3           | 52.3          | 48.6            |
| 61 - 120 Days                            | 20.3                             | 26.2          | 28.7          | 29.1           | 2.9             | 7.3           | 10.5          | 30.1          | 3.5           | 4.1            | 7.1           | 5.4             |
| 121 - 180 Days                           | 10.0                             | 13.9          | 13.0          | 9.4            | 0.7             | 4.5           | 2.3           | 3.8           | 2.4           | -              | 0.9           | 7.2             |
| 181 Days or More                         | 9.2                              | 23.2          | 8.8           | 10.8           | 4.9             | -             | 0.9           | -             | -             | -              | 0.5           | -               |
| <b>TOTAL</b>                             | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Mean No. of Days                         | 78.1                             | 124.6         | 87.9          | 86.4           | 34.6            | 38.5          | 41.8          | 62.0          | 42.6          | 26.2           | 28.4          | 34.7            |
| Median No. of Days                       | 59.0                             | 90.0          | 61.0          | 60.0           | 30.0            | 30.0          | 30.0          | 40.0          | 30.0          | 20.0           | 20.0          | 30.0            |

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 26  
**MEANS OF BOOKING AIR TRIP AND LODGING  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Travel agents booked approximately 57% of airline ticket reservations for overseas leisure travelers to California. The proportion of travel agent air bookings ranged from a low of 44% for leisure travelers from the U.K., to a high of 94%\*\* of leisure travelers from India, and 79% of leisure travelers from Australia/New Zealand as well as Malaysia\*\*.
- A personal computer (i.e., Internet) was the second most common method used by leisure overseas visitors to book air trips (17%). This percent was up from 14 % in 2004. Booking with the airline directly was the next most common method used to book air trips by leisure visitors to California.
- Travel agents played a less significant role in booking U.S. lodging reservations (29%) than in booking airline reservations (57%).

| COUNTRY OF RESIDENCE OF VISITORS   |                   |               |               |                |                 |               |               |               |               |                |               |                 |
|------------------------------------|-------------------|---------------|---------------|----------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
| MEANS OF BOOKING AIR TRIP*         | AUSTRALIA/        |               |               |                |                 |               |               |               |               |                |               |                 |
|                                    | TOTAL<br>OVERSEAS | U.K.          | GERMANY       | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS                | 2,930,000         | 630,000       | 186,000       | 287,000        | 44,000          | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents)            | (3,600)           | (545)         | (128)         | (731)          | (45)**          | (40)**        | (747)         | (57)**        | (98)**        | (128)          | (405)         | (125)           |
| Travel Agent                       | 57.3%             | 44.1%         | 61.8%         | 79.4%          | 62.7%           | 94.6%         | 55.0%         | 78.6%         | 54.6%         | 62.8%          | 66.7%         | 56.3%           |
| Personal Computer                  | 17.1              | 26.1          | 13.4          | 5.2            | 8.2             | -             | 11.3          | 1.3           | 13.2          | 9.5            | 11.3          | 4.3             |
| Airline Directly                   | 13.6              | 12.9          | 12.6          | 9.9            | 13.0            | 5.4           | 16.3          | 14.6          | 21.3          | 20.7           | 9.3           | 26.9            |
| Tour Operator                      | 7.2               | 13.6          | 4.0           | 0.8            | 3.0             | -             | 11.2          | 1.5           | 1.9           | 5.3            | 5.8           | 0.7             |
| Company Travel Dept.               | 2.1               | 1.5           | 3.4           | 1.7            | 1.9             | -             | 2.7           | 2.3           | 6.4           | 1.1            | 3.4           | 8.4             |
| Travel Club                        | 0.9               | 0.6           | 3.4           | 0.8            | 0.9             | -             | 0.2           | -             | 2.0           | 0.2            | 0.7           | 3.2             |
| Other/Don't Know                   | 1.9               | 1.1           | 1.5           | 2.1            | 10.4            | 0.0           | 3.3           | 1.8           | 0.5           | 0.4            | 2.8           | 0.2             |
| <b>TOTAL</b>                       | <b>100.0%</b>     | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| <b>MEANS OF BOOKING LODGING***</b> |                   |               |               |                |                 |               |               |               |               |                |               |                 |
| (Number of Respondents)            | (3,612)           | (547)         | (130)         | (755)          | (46)**          | (40)**        | (723)         | (57)**        | (99)**        | (127)          | (414)         | (121)           |
| <b>Yes, Booked by:</b>             | <b>61.4%</b>      | <b>69.6%</b>  | <b>62.9%</b>  | <b>60.4%</b>   | <b>41.8%</b>    | <b>25.9%</b>  | <b>79.3%</b>  | <b>69.0%</b>  | <b>69.8%</b>  | <b>60.9%</b>   | <b>40.7%</b>  | <b>48.4%</b>    |
| Travel Agent                       | 28.6%             | 30.7%         | 33.1%         | 39.6%          | 17.1%           | 17.1%         | 38.1%         | 15.1%         | 19.5%         | 18.7%          | 20.3%         | 37.6%           |
| Hotel/Motel Directly               | 11.2              | 15.0          | 9.4           | 14.9           | -               | 2.3           | 13.3          | 7.3           | 18.6          | 4.5            | 2.1           | 4.4             |
| Tour Operator                      | 7.7               | 13.5          | 13.4          | 2.6            | -               | -             | 11.4          | 1.5           | 4.7           | 0.6            | 4.9           | 2.4             |
| Friend or Relative                 | 7.6               | 2.5           | 2.7           | 3.6            | 22.2            | 6.5           | 10.1          | 36.2          | 6.7           | 19.8           | 8.0           | 4.0             |
| Company Travel Dept.               | 1.7               | 2.0           | 1.3           | 2.6            | -               | -             | 2.6           | 1.3           | 4.9           | 0.4            | 1.8           | -               |
| Airline Staff                      | 1.0               | 0.6           | 0.7           | 1.1            | 0.8             | -             | 1.5           | 1.5           | 4.0           | 1.6            | 2.0           | 1.0             |
| Business Associate                 | 0.8               | 0.3           | 0.9           | 0.3            | -               | -             | 1.1           | 1.2           | -             | 5.1            | 0.6           | 0.1             |
| Other                              | 9.8               | 11.2          | 7.5           | 11.3           | 3.9             | -             | 7.9           | 32.9          | 25.1          | 11.0           | 5.8           | 4.0             |
| <b>No</b>                          | <b>38.6%</b>      | <b>30.4%</b>  | <b>37.1%</b>  | <b>39.6%</b>   | <b>58.2%</b>    | <b>74.1%</b>  | <b>20.7%</b>  | <b>31.0%</b>  | <b>30.2%</b>  | <b>39.1%</b>   | <b>59.3%</b>  | <b>51.6%</b>    |

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size

\*\*\* Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.

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Table 27

**U.S. TRIP INFORMATION SOURCES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Travel agents were a key information source for trip information and travel planning across all countries of origin (49%), particularly for visitors from India (75%)\*\*, Australia/New Zealand (73%) and Malaysia (66%)\*\*. Personal computer (39%) followed by friends and relatives (21%) were the next most frequently mentioned trip planning sources for leisure travelers to California. Leisure travelers from Malaysia and Singapore reported the highest use of personal computer (53%\*\* and 51% each respectively).

| INFORMATION SOURCES*                           | COUNTRY OF RESIDENCE OF VISITORS |                           |                  |                  |                  |                  |                  |                  |                 |                  |                 |                  |
|--|----------------------------------|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|-----------------|------------------|-----------------|------------------|
|  | TOTAL<br>OVERSEAS                | AUSTRALIA/<br>NEW ZEALAND |                  |                  |                  |                  |                  |                  |                 |                  |                 | MEXICO<br>(AIR)  |
|  |                                  | U.K.                      | GERMANY          | CHINA<br>w/o HK  | INDIA            | JAPAN            | MALAYSIA         | SINGAPORE        | SOUTH<br>KOREA  | TAIWAN           |                 |                  |
| ESTIMATED TRAVELERS<br>(Number of Respondents) | 2,930,000<br>(3,668)             | 630,000<br>(552)          | 186,000<br>(131) | 287,000<br>(752) | 44,000<br>(45)** | 25,000<br>(41)** | 327,000<br>(754) | 10,000<br>(58)** | 33,000<br>(100) | 128,000<br>(129) | 94,000<br>(415) | 381,000<br>(125) |
| Travel Agency                                  | 49.0%                            | 43.9%                     | 34.0%            | 73.4%            | 39.3%            | 75.1%            | 50.7%            | 65.6%            | 38.2%           | 45.8%            | 56.1%           | 54.8%            |
| Personal Computer                              | 39.5                             | 42.4                      | 33.7             | 33.5             | 24.9             | 26.3             | 42.5             | 53.2             | 51.4            | 47.4             | 31.9            | 22.1             |
| Friends/Relatives                              | 21.2                             | 16.4                      | 21.0             | 24.4             | 37.0             | 31.1             | 27.5             | 48.7             | 21.4            | 30.8             | 25.5            | 4.1              |
| Airlines Directly                              | 18.4                             | 19.2                      | 21.1             | 14.5             | 17.3             | 7.3              | 17.6             | 32.7             | 33.7            | 14.1             | 22.7            | 30.2             |
| Published Sources                              | 13.0                             | 15.9                      | 16.9             | 13.0             | 4.4              | -                | 17.7             | 33.7             | 16.1            | 2.4              | 9.5             | 0.3              |
| Tour Company                                   | 8.7                              | 15.1                      | 13.0             | 4.0              | 4.9              | 2.3              | 16.7             | 29.0             | 3.5             | 4.5              | 5.5             | 0.5              |
| Government Sources                             | 7.1                              | 5.7                       | 36.6             | 6.1              | 0.8              | 1.9              | 3.9              | 11.4             | 9.7             | 1.6              | 1.7             | 4.8              |
| Newspapers/Magazines                           | 5.4                              | 6.2                       | 5.6              | 5.7              | 0.8              | 4.2              | 7.2              | 9.5              | 13.0            | 3.2              | 4.0             | -                |
| TV/Radio Ads                                   | 1.7                              | 1.4                       | 3.7              | 2.8              | 0.8              | -                | 2.2              | 1.2              | 1.8             | -                | 0.9             | -                |
| In-flight Info. Systems                        | 1.5                              | 0.8                       | 1.4              | 1.1              | 0.6              | -                | 0.8              | 2.2              | 3.6             | 0.4              | 3.6             | 0.1              |
| Corporate Travel Dept.                         | 1.4                              | 0.3                       | 3.7              | 1.6              | 3.6              | -                | 3.5              | 0.9              | 5.4             | -                | 2.8             | 8.3              |

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.  
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Table 28

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Most of the overseas leisure travelers to California (78%) purchased a coach class ticket, particularly visitors from Germany (84%) and the U.K. (83%).
- About one-fifth (21%) of overseas leisure travelers to California used a prepaid package.

| TYPE OF AIRLINE TICKET        | COUNTRY OF RESIDENCE OF VISITORS |               |               |                |                               |               |               |               |               |                |               |                 |
|-------------------------------|----------------------------------|---------------|---------------|----------------|-------------------------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                               | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | NEW<br>ZEALAND | AUSTRALIA/<br>CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS           | 2,930,000                        | 630,000       | 186,000       | 287,000        | 44,000                        | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents)       | (3,521)                          | (542)         | (126)         | (721)          | (42)**                        | (37)**        | (731)         | (58)**        | (97)**        | (119)          | (398)         | (108)           |
| Economy/Tourist/Coach         | 78.1%                            | 83.1%         | 84.3%         | 75.5%          | 58.8%                         | 78.8%         | 66.2%         | 72.1%         | 77.7%         | 81.2%          | 68.0%         | 81.2%           |
| Executive/Business            | 9.8                              | 5.6           | 9.7           | 11.5           | 29.8                          | 16.2          | 15.4          | 15.9          | 9.1           | 5.9            | 16.1          | 27.6            |
| Frequent Flyer Award          | 4.7                              | 3.6           | 2.2           | 5.9            | 6.4                           | 2.4           | 3.7           | -             | 9.1           | 2.7            | 1.8           | 0.4             |
| Discount/Group Fare           | 3.3                              | 1.9           | 1.5           | 2.5            | -                             | 1.0           | 8.4           | 5.8           | 4.6           | 7.9            | 8.9           | 0.1             |
| Frequent Flyer Upgrade        | 2.1                              | 1.2           | 1.1           | 3.2            | -                             | -             | 3.2           | -             | 1.3           | 5.4            | 5.5           | 1.0             |
| First Class                   | 1.6                              | 1.1           | -             | 0.9            | 2.8                           | 3.8           | 1.2           | 1.3           | 6.4           | 1.9            | 2.0           | 2.4             |
| Non-revenue                   | 1.5                              | 1.4           | 2.9           | 3.2            | -                             | 1.2           | 1.2           | 3.4           | 1.0           | 0.8            | 0.4           | -               |
| Don't Know                    | 2.5                              | 3.4           | 2.3           | 1.5            | 2.3                           | -             | 6.6           | 1.5           | 1.3           | -              | 0.9           | 1.4             |
| <b>USE OF PREPAID PACKAGE</b> |                                  |               |               |                |                               |               |               |               |               |                |               |                 |
| (Number of Respondents)       | (3,616)                          | (552)         | (130)         | (743)          | (44)**                        | (37)**        | (750)         | (57)**        | (100)         | (127)          | (407)         | (113)           |
| <b>Yes***</b>                 | <b>20.9%</b>                     | <b>27.0%</b>  | <b>32.2%</b>  | <b>17.1%</b>   | <b>8.9%</b>                   | <b>4.4%</b>   | <b>30.4%</b>  | <b>4.2%</b>   | <b>12.4%</b>  | <b>9.8%</b>    | <b>14.4%</b>  | <b>7.4%</b>     |
| Air/Lodging                   | 14.5%                            | 19.2%         | 27.0%         | 10.2%          | 1.7%                          | 4.4%          | 25.5%         | 2.2%          | 8.4%          | 4.5%           | 9.4%          | 6.5%            |
| Guided Tour                   | 11.0                             | 10.2          | 22.4          | 10.1           | 4.4                           | -             | 13.6          | 4.2           | 12.4          | 9.2            | 7.6           | 3.2             |
| Air/Lodging/Tour              | 6.3                              | 4.6           | 20.2          | 4.6            | 1.7                           | -             | 10.6          | 2.2           | 8.4           | 4.3            | 3.7           | 2.2             |
| Air/Lodging/Bus               | 5.3                              | 3.9           | 15.0          | 5.1            | 1.7                           | -             | 7.2           | 2.2           | 4.9           | 4.3            | 3.7           | 0.3             |
| Air/Rent Car                  | 4.3                              | 7.4           | 9.4           | 3.2            | 1.7                           | 4.4           | 1.6           | -             | -             | 0.6            | 2.9           | 0.1             |
| Air/Lodging/Bus/Tour          | 4.3                              | 2.2           | 15.0          | 3.0            | 1.7                           | -             | 5.5           | 2.2           | 4.9           | 4.3            | 3.1           | 0.2             |
| Air/Lodging/Rent Car          | 3.6                              | 6.1           | 6.4           | 2.5            | 1.7                           | 4.4           | 1.6           | -             | -             | 0.2            | 2.8           | 0.1             |
| Cruise                        | 1.4                              | 2.1           | 3.2           | 1.4            | -                             | 4.4           | 0.9           | 1.9           | 1.3           | 3.2            | 2.8           | 0.1             |
| <b>No</b>                     | <b>79.1</b>                      | <b>73.0</b>   | <b>67.8</b>   | <b>82.9</b>    | <b>91.1</b>                   | <b>95.6</b>   | <b>69.6</b>   | <b>95.8</b>   | <b>87.6</b>   | <b>90.2</b>    | <b>85.6</b>   | <b>92.6</b>     |
| <b>TOTAL</b>                  | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>                 | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |

\*\*Caution - Small sample size

\*\*\*Multiple response. Includes all package combinations. Each category not mutually exclusive.

Source: ITA/OTTI, Survey of International Air Travelers, 2005.

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Table 29

**TRAVEL PARTY SIZE  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Approximately nine in ten (89%) of all leisure travel groups to California consisted of adults only, while 11% were adults traveling with children. The mean total party size for leisure travelers was 1.8 persons. These results are very similar to those from previous years.

| TRAVEL PARTY SIZE*         | COUNTRY OF RESIDENCE OF VISITORS |               |               |                |                               |               |               |               |               |                |               |                 |
|----------------------------|----------------------------------|---------------|---------------|----------------|-------------------------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                            | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | NEW<br>ZEALAND | AUSTRALIA/<br>CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS        | 2,930,000                        | 630,000       | 186,000       | 287,000        | 44,000                        | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents)    | (3,704)                          | (558)         | (130)         | (759)          | (46)**                        | (41)**        | (763)         | (58)**        | (102)         | (130)          | (419)         | (124)           |
| Adults Only                | 89.3%                            | 93.1%         | 91.3%         | 83.4%          | 85.8%                         | 88.2%         | 85.9%         | 76.1%         | 71.7%         | 90.8%          | 87.3%         | 83.2%           |
| Adults and Children        | 10.7                             | 6.9           | 8.7           | 16.6           | 14.2                          | 11.8          | 14.1          | 23.9          | 28.3          | 9.2            | 12.7          | 16.8            |
| <b>TOTAL</b>               | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b>                 | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |
| Mean Total Party Size      | 1.8                              | 1.9           | 1.6           | 1.9            | 1.7                           | 1.6           | 1.9           | 2.4           | 2.1           | 1.6            | 1.6           | 1.7             |
| Median Total Party Size    | 1.0                              | 2.0           | 1.0           | 2.0            | 1.0                           | 1.0           | 1.0           | 2.0           | 1.0           | 1.0            | 1.0           | 1.0             |
| <b>ADULTS ONLY</b>         |                                  |               |               |                |                               |               |               |               |               |                |               |                 |
| (Number of Respondents)    | (3,107)                          | (506)         | (117)         | (609)          | (40)**                        | (37)**        | (648)         | (39)**        | (61)**        | (104)          | (348)         | (101)           |
| Mean Adult Party Size      | 1.5                              | 1.8           | 1.5           | 1.5            | 1.4                           | 1.5           | 1.6           | 2.0           | 1.4           | 1.3            | 1.3           | 1.4             |
| Median Adult Party Size    | 1.0                              | 2.0           | 1.0           | 1.0            | 1.0                           | 1.0           | 1.0           | 1.0           | 1.0           | 1.0            | 1.0           | 1.0             |
| <b>ADULTS AND CHILDREN</b> |                                  |               |               |                |                               |               |               |               |               |                |               |                 |
| (Number of Respondents)    | (597)                            | (52)**        | (13)**        | (150)          | (6)**                         | (4)**         | (115)         | (19)**        | (41)**        | (26)**         | (71)**        | (23)**          |
| Mean Party Size            | 3.5                              | 3.4           | 3.4           | 3.6            | 3.4                           | 2.9           | 3.3           | 3.8           | 3.9           | 4.1            | 3.5           | 3.1             |
| Median Party Size          | 3.0                              | 3.0           | 3.0           | 3.0            | 2.0                           | 3.0           | 3.0           | 4.0           | 4.0           | 4.0            | 3.0           | 3.0             |

\*Column percentages may total more than 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 30

**SEX AND AGE**  
**OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA**  
**(2005)**

- Similar to previous years, 52% of overseas leisure travelers to California in 2005 were male and 48% female. The median age for males in 2005 was 43 years, versus 41 years for females. Male overseas leisure travelers were slightly younger in 2005 than in 2004 (43 years vs. 44 years respectively), while females were slightly older (41 years vs. 39 years respectively).

| SEX AND AGE OF VISITOR*   | COUNTRY OF RESIDENCE OF VISITORS |              |              |              |              |              |              |              |              |              |              |              |
|---------------------------|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                           | AUSTRALIA/                       |              |              |              |              |              |              |              |              |              |              |              |
|                           | TOTAL                            |              |              | NEW          | CHINA        |              |              |              |              | SOUTH        |              | MEXICO       |
|                           | OVERSEAS                         | U.K.         | GERMANY      | ZEALAND      | w/o HK       | INDIA        | JAPAN        | MALAYSIA     | SINGAPORE    | KOREA        | TAIWAN       | (AIR)        |
| ESTIMATED TRAVELERS       | 2,930,000                        | 630,000      | 186,000      | 287,000      | 44,000       | 25,000       | 327,000      | 10,000       | 33,000       | 128,000      | 94,000       | 381,000      |
| (Number of Respondents)   | (3,430)                          | (531)        | (124)        | (710)        | (38)**       | (37)**       | (704)        | (56)**       | (92)**       | (117)        | (384)        | (106)        |
| <b>MALE ADULTS</b>        | <b>51.9%</b>                     | <b>47.4%</b> | <b>60.6%</b> | <b>44.4%</b> | <b>69.2%</b> | <b>83.0%</b> | <b>52.7%</b> | <b>73.5%</b> | <b>59.6%</b> | <b>48.4%</b> | <b>48.8%</b> | <b>46.6%</b> |
| 18-24 Years               | 3.8                              | 3.0          | 4.6          | 3.2          | 3.0          | 4.7          | 4.2          | 0.9          | 3.3          | 1.5          | 2.7          | 3.0          |
| 25 - 34 Years             | 11.2                             | 9.7          | 8.0          | 11.4         | 8.0          | 3.2          | 9.7          | 4.3          | 13.8         | 8.7          | 11.3         | 8.9          |
| 35 - 54 Years             | 23.6                             | 20.6         | 25.9         | 20.9         | 34.8         | 11.3         | 25.3         | 23.4         | 35.1         | 29.6         | 23.2         | 11.5         |
| 55 + Years                | 13.3                             | 14.1         | 22.1         | 9.0          | 23.4         | 63.8         | 13.5         | 44.7         | 7.3          | 8.6          | 11.6         | 23.3         |
| <b>Average Male Age</b>   | <b>44.4</b>                      | <b>46.0</b>  | <b>48.1</b>  | <b>42.3</b>  | <b>48.2</b>  | <b>57.6</b>  | <b>44.5</b>  | <b>51.6</b>  | <b>40.7</b>  | <b>45.2</b>  | <b>43.2</b>  | <b>48.2</b>  |
| <b>Median Male Age</b>    | <b>43.0</b>                      | <b>46.0</b>  | <b>49.0</b>  | <b>42.0</b>  | <b>48.0</b>  | <b>62.0</b>  | <b>43.0</b>  | <b>55.0</b>  | <b>41.0</b>  | <b>45.0</b>  | <b>40.0</b>  | <b>56.0</b>  |
| <b>FEMALE ADULTS</b>      | <b>48.1%</b>                     | <b>52.6%</b> | <b>39.4%</b> | <b>55.6%</b> | <b>30.8%</b> | <b>17.0%</b> | <b>47.3%</b> | <b>26.5%</b> | <b>40.4%</b> | <b>51.6%</b> | <b>51.2%</b> | <b>53.4%</b> |
| 18-24 Years               | 6.4                              | 5.5          | 3.5          | 7.8          | 2.3          | 1.5          | 5.4          | -            | 5.8          | 9.1          | 5.6          | 4.4          |
| 25 - 34 Years             | 10.1                             | 10.8         | 9.5          | 8.4          | 4.3          | 7.9          | 11.0         | 7.6          | 9.7          | 14.5         | 17.5         | 12.0         |
| 35 - 54 Years             | 22.1                             | 22.6         | 18.2         | 29.9         | 17.9         | 7.6          | 20.0         | 15.9         | 23.7         | 23.7         | 22.5         | 33.8         |
| 55 + Years                | 9.5                              | 13.5         | 8.2          | 9.6          | 6.3          | 0.0          | 10.9         | 3.1          | 1.1          | 4.3          | 5.6          | 3.2          |
| <b>Average Female Age</b> | <b>41.7</b>                      | <b>43.7</b>  | <b>42.4</b>  | <b>41.8</b>  | <b>42.7</b>  | <b>36.2</b>  | <b>42.0</b>  | <b>41.0</b>  | <b>37.5</b>  | <b>36.2</b>  | <b>37.9</b>  | <b>36.9</b>  |
| <b>Median Female Age</b>  | <b>41.0</b>                      | <b>44.0</b>  | <b>41.0</b>  | <b>42.0</b>  | <b>45.0</b>  | <b>31.0</b>  | <b>39.0</b>  | <b>40.0</b>  | <b>40.0</b>  | <b>35.0</b>  | <b>36.0</b>  | <b>37.0</b>  |

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 31

**ANNUAL HOUSEHOLD INCOME  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Overseas leisure travelers to California had a median household income of \$71,900, compared to \$67,500 in 2004 and \$78,800 for all overseas travelers to California (Table 14).
- Overseas visitors from the U.K. reported the highest median household income (\$88,800), followed by Japan (\$84,300).

| ANNUAL HOUSEHOLD INCOME*                       | COUNTRY OF RESIDENCE OF VISITORS |                  |                  |                  |                               |                  |                  |                  |                  |                  |                 |                   |
|--|----------------------------------|------------------|------------------|------------------|-------------------------------|------------------|------------------|------------------|------------------|------------------|-----------------|-------------------|
|  | TOTAL<br>OVERSEAS                | U.K.             | GERMANY          | NEW<br>ZEALAND   | AUSTRALIA/<br>CHINA<br>w/o HK | INDIA            | JAPAN            | MALAYSIA         | SINGAPORE        | SOUTH<br>KOREA   | TAIWAN          | MEXICO<br>(AIR)   |
| ESTIMATED TRAVELERS<br>(NUMBER OF RESPONDENTS) | 2,930,000<br>(3,018)             | 630,000<br>(468) | 186,000<br>(104) | 287,000<br>(639) | 44,000<br>(38)**              | 25,000<br>(32)** | 327,000<br>(575) | 10,000<br>(56)** | 33,000<br>(94)** | 128,000<br>(107) | 94,000<br>(373) | 381,000<br>(88)** |
| Under \$20,000                                 | 7.2%                             | 2.4%             | 5.4%             | 3.8%             | 24.0%                         | 17.8%            | 3.7%             | 15.2%            | 11.4%            | 7.6%             | 6.4%            | 23.6%             |
| \$20,000 - \$59,000                            | 33.1                             | 26.2             | 37.1             | 31.3             | 31.8                          | 44.8             | 28.8             | 31.4             | 26.5             | 31.7             | 41.7            | 53.7              |
| \$60,000 - \$99,999                            | 27.9                             | 28.7             | 32.8             | 37.3             | 12.9                          | 14.9             | 31.2             | 28.7             | 25.0             | 42.2             | 25.9            | 5.0               |
| \$100,000 - \$139,999                          | 14.4                             | 23.2             | 15.4             | 13.7             | 8.0                           | 17.5             | 14.8             | 13.0             | 14.9             | 14.2             | 12.3            | 1.3               |
| \$140,000 - \$179,999                          | 6.8                              | 9.1              | 3.6              | 5.2              | 15.6                          | 0.0              | 10.6             | 3.4              | 3.5              | 1.7              | 5.1             | 6.5               |
| \$180,000 and over                             | 10.5                             | 10.5             | 5.7              | 8.7              | 7.7                           | 5.0              | 10.9             | 8.3              | 18.8             | 2.5              | 8.7             | 10.0              |
| <b>TOTAL</b>                                   | <b>100.0%</b>                    | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>                 | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>    | <b>100.0%</b>   | <b>100.0%</b>     |
| Average Annual Income                          | \$85,500                         | \$97,100         | \$78,000         | \$84,700         | \$71,800                      | \$60,500         | \$94,300         | \$72,900         | \$92,800         | \$71,200         | \$77,000        | \$57,900          |
| Median Annual Income                           | \$71,900                         | \$88,800         | \$71,800         | \$75,000         | \$41,500                      | \$48,400         | \$84,300         | \$62,500         | \$76,000         | \$67,900         | \$62,600        | \$34,600          |

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 32

**NIGHTS AWAY FROM HOME  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Overseas leisure visitors to California had an average U.S. trip stay of 20 nights and an average stay in California of 11 nights. Japanese and Mexico (air) leisure travelers reported the shortest trip stays in the U.S. (8 nights and 9 nights each respectively). These two groups also reported the shortest trip stays in California (6 nights each respectively). On the other hand, leisure travelers from India reported the longest stay in the U.S. and in California (74 nights\*\* and 52 nights\*\*, respectively).

| NIGHTS IN U.S.              | COUNTRY OF RESIDENCE OF VISITORS |         |         |                              |                 |        |         |          |           |                |        |                 |
|-----------------------------|----------------------------------|---------|---------|------------------------------|-----------------|--------|---------|----------|-----------|----------------|--------|-----------------|
|                             | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS         | 2,930,000                        | 630,000 | 186,000 | 287,000                      | 44,000          | 25,000 | 327,000 | 10,000   | 33,000    | 128,000        | 94,000 | 381,000         |
| (Number of Respondents)     | (3,687)                          | (557)   | (131)   | (758)                        | (43)**          | (38)** | (762)   | (58)**   | (102)     | (129)          | (416)  | (121)           |
| Mean No. Nights             | 19.8                             | 15.1    | 21.8    | 22.8                         | 38.5            | 74.0   | 8.3     | 16.0     | 20.6      | 20.2           | 21.2   | 8.9             |
| Median No. Nights           | 14.0                             | 14.0    | 18.0    | 19.0                         | 25.0            | 44.0   | 6.0     | 15.0     | 12.0      | 13.0           | 13.0   | 8.0             |
| <b>NIGHTS IN CALIFORNIA</b> |                                  |         |         |                              |                 |        |         |          |           |                |        |                 |
| (Number of Respondents)     | (3,271)                          | (505)   | (117)   | (708)                        | (34)**          | (35)** | (691)   | (52)**   | (94)**    | (113)          | (337)  | (95)**          |
| Mean Nts. in Dest.          | 10.5                             | 7.5     | 11.6    | 8.7                          | 26.0            | 51.8   | 6.2     | 11.2     | 11.9      | 14.5           | 14.6   | 6.2             |
| Median Nts. in Dest.        | 7.0                              | 7.0     | 7.0     | 7.0                          | 10.0            | 17.0   | 4.0     | 11.0     | 8.0       | 7.0            | 8.0    | 6.0             |

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.  
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Table 33

**PORT OF ENTRY  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Once again, Los Angeles was the major port of entry for all leisure travelers to California (41%) followed by San Francisco (19%).

| PORT OF ENTRY*          | COUNTRY OF RESIDENCE OF VISITORS |               |               |                              |                 |               |               |               |               |                |               |                 |
|-------------------------|----------------------------------|---------------|---------------|------------------------------|-----------------|---------------|---------------|---------------|---------------|----------------|---------------|-----------------|
|                         | TOTAL<br>OVERSEAS                | U.K.          | GERMANY       | AUSTRALIA/<br>NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA         | JAPAN         | MALAYSIA      | SINGAPORE     | SOUTH<br>KOREA | TAIWAN        | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS     | 2,930,000                        | 630,000       | 186,000       | 287,000                      | 44,000          | 25,000        | 327,000       | 10,000        | 33,000        | 128,000        | 94,000        | 381,000         |
| (Number of Respondents) | (3,710)                          | (558)         | (131)         | (759)                        | (46)**          | (41)**        | (763)         | (58)**        | (102)         | (130)          | (420)         | (126)           |
| Atlanta, GA             | 2.6%                             | 5.7%          | 4.6%          | 0.1%                         | -               | -             | -             | -             | 0.5%          | -              | -             | -               |
| Boston, MA              | 1.1                              | 1.3           | 0.6           | 0.3                          | -               | -             | -             | -             | -             | -              | -             | -               |
| Chicago, IL             | 4.5                              | 9.7           | 6.2           | 0.7                          | 5.8%            | -             | 1.9%          | -             | -             | 1.8%           | -             | -               |
| Cincinnati, OH          | 0.2                              | 0.4           | 2.0           | -                            | -               | -             | -             | -             | -             | -              | -             | -               |
| Dallas/Ft. Worth, TX    | 0.7                              | 1.0           | 0.2           | 0.3                          | -               | 1.0%          | -             | -             | -             | -              | 0.7%          | 0.6%            |
| Detroit, MI             | 0.3                              | -             | -             | -                            | -               | -             | 0.7           | -             | -             | 2.4            | -             | -               |
| Honolulu, HI            | 2.1                              | 0.4           | -             | 13.2                         | -               | -             | 3.9           | -             | 2.4           | 1.7            | 1.7           | -               |
| Houston, TX             | 0.4                              | 0.4           | -             | -                            | -               | -             | -             | -             | -             | -              | 0.7           | 1.8             |
| Los Angeles, CA         | 41.0                             | 34.3          | 40.9          | 64.0                         | 39.8            | 46.6          | 55.4          | 52.6%         | 44.6          | 44.0           | 60.8          | 58.1            |
| Miami, FL               | 1.6                              | 1.1           | 1.0           | 0.6                          | -               | 1.4           | -             | -             | -             | -              | -             | -               |
| Minn./St. Paul, MN      | -                                | -             | -             | -                            | -               | -             | -             | -             | -             | -              | -             | -               |
| New York, NY            | 4.7                              | 4.1           | 3.1           | 3.1                          | 3.3             | 4.1           | 1.3           | 0.9           | 1.1           | 5.6            | 0.9           | -               |
| Newark, NJ              | 1.1                              | 0.7           | -             | 0.3                          | -               | -             | -             | 2.7           | 5.0           | -              | 0.6           | -               |
| Orlando, FL             | 0.1                              | 0.4           | -             | -                            | -               | -             | -             | -             | -             | -              | -             | -               |
| Philadelphia, PA        | 0.2                              | -             | 1.8           | 0.2                          | -               | -             | -             | -             | 0.2           | -              | -             | -               |
| Portland, OR            | 0.1                              | -             | 0.9           | -                            | -               | -             | 0.3           | -             | -             | -              | -             | -               |
| San Francisco, CA       | 18.8                             | 21.9          | 26.5          | 12.0                         | 42.2            | 36.3          | 24.0          | 35.6          | 33.4          | 26.0           | 23.2          | 11.1            |
| Seattle, WA             | -                                | -             | -             | -                            | -               | -             | -             | -             | -             | -              | -             | -               |
| Washington, DC          | 0.4                              | 0.1           | -             | 0.1                          | -               | -             | 0.8           | -             | -             | -              | 1.4           | -               |
| Other Port              | 1.7                              | 1.2           | 5.8           | 0.4                          | 0.0             | 0.0           | 0.9           | 0.0           | 0.0           | 0.0            | 0.0           | 0.4             |
| <b>TOTAL</b>            | <b>100.0%</b>                    | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>                | <b>100.0%</b>   | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>  | <b>100.0%</b> | <b>100.0%</b>   |

\*Column percentages may not total to 100 percent due to rounding.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 34

**ACCOMMODATIONS  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Three-quarters (75%) of overseas leisure travelers to California reported staying in hotels or motels at some time during their trip. Hotel usage was highest among visitors from Malaysia (89%)\*\*, the U.K. (88%) and Singapore (86%)\*\*. Hotel usage was lowest among visitors from India (23%). A high proportion of Indian (84%), Taiwanese (66%), and South Korean (59%) leisure travelers stayed in private homes.

| TYPE OF ACOMMODATIONS*                         | COUNTRY OF RESIDENCE OF VISITORS |                           |                  |                  |                  |                  |                  |                  |                  |                  |                 |                   |        |
|--|----------------------------------|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|-----------------|-------------------|--------|
|  | TOTAL<br>OVERSEAS                | AUSTRALIA/<br>NEW ZEALAND |                  |                  |                  | CHINA            | INDIA            | JAPAN            | MALAYSIA         | SINGAPORE        | SOUTH           | TAIWAN            | MEXICO |
|  |                                  | U.K.                      | GERMANY          | ZEALAND          | w/o HK           | KOREA            |                  |                  |                  |                  | (AIR)           |                   |        |
| ESTIMATED TRAVELERS<br>(Number of Respondents) | 2,930,000<br>(3,131)             | 630,000<br>(494)          | 186,000<br>(109) | 287,000<br>(680) | 44,000<br>(33)** | 25,000<br>(33)** | 327,000<br>(660) | 10,000<br>(52)** | 33,000<br>(92)** | 128,000<br>(105) | 94,000<br>(318) | 381,000<br>(91)** |        |
| <b>Hotel / Motel</b>                           | <b>74.7%</b>                     | <b>87.5%</b>              | <b>76.2%</b>     | <b>77.1%</b>     | <b>55.1%</b>     | <b>23.1%</b>     | <b>79.4%</b>     | <b>89.3%</b>     | <b>85.8%</b>     | <b>47.3%</b>     | <b>46.1%</b>    | <b>66.9%</b>      |        |
| Mean Nights in Dest.                           | 5.8                              | 5.7                       | 5.8              | 6.1              | 6.5              | 2.9              | 4.0              | 8.1              | 6.3              | 5.6              | 5.9             | 4.2               |        |
| Median Nights in Dest.                         | 4.0                              | 5.0                       | 4.0              | 5.0              | 7.0              | 3.0              | 4.0              | 7.0              | 5.0              | 4.0              | 4.0             | 4.0               |        |
| <b>Private Home</b>                            | <b>35.8%</b>                     | <b>23.8%</b>              | <b>43.2%</b>     | <b>30.7%</b>     | <b>55.9%</b>     | <b>83.5%</b>     | <b>26.2%</b>     | <b>23.7%</b>     | <b>33.2%</b>     | <b>59.2%</b>     | <b>66.2%</b>    | <b>41.9%</b>      |        |
| Mean Nights in Dest.                           | 15.8                             | 9.8                       | 16.4             | 12.2             | 26.9             | 45.9             | 11.0             | 14.7             | 14.3             | 18.8             | 17.5            | 7.7               |        |
| Median Nights in Dest.                         | 9.0                              | 8.0                       | 8.5              | 8.0              | 10.0             | 21.0             | 6.0              | 12.0             | 7.0              | 8.0              | 10.0            | 5.0               |        |
| <b>Other</b>                                   | <b>3.6%</b>                      | <b>2.2%</b>               | <b>5.9%</b>      | <b>2.2%</b>      | -                | -                | <b>1.9%</b>      | <b>1.2%</b>      | <b>4.1%</b>      | <b>0.9%</b>      | <b>2.7%</b>     | <b>1.3%</b>       |        |

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 35

**TRANSPORTATION IN THE U.S.  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Leisure travelers relied upon a variety of transportation within the U.S. including domestic flights (40%), private or company autos (35%), taxis/limousines (35%), and rental cars (34%). Leisure visitors from Australia/New Zealand, India and Malaysia relied heavily on domestic airline travel (55%, 49%\*\* and 47%\*\* respectively), whereas leisure visitors from China, Taiwan and South Korea relied heavily on a company or private auto (64%\*\* and 60%, and 51% each respectively). Rental car use was highest among Malaysian (51%)\*\* and Chinese (49%)\*\* leisure visitors.

| COUNTRY OF RESIDENCE OF VISITORS |                   |         |         |                |                 |        |         |          |           |                |        |                 |
|----------------------------------|-------------------|---------|---------|----------------|-----------------|--------|---------|----------|-----------|----------------|--------|-----------------|
| TRANSPORTATION IN U.S.*          | AUSTRALIA/        |         |         |                |                 |        |         |          |           |                |        |                 |
|                                  | TOTAL<br>OVERSEAS | U.K.    | GERMANY | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA  | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS              | 2,930,000         | 630,000 | 186,000 | 287,000        | 44,000          | 25,000 | 327,000 | 10,000   | 33,000    | 128,000        | 94,000 | 381,000         |
| (Number of Respondents)          | (3,394)           | (519)   | (120)   | (685)          | (40)**          | (34)** | (728)   | (56)**   | (93)**    | (122)          | (380)  | (95)**          |
| Airlines in U.S.                 | 40.0%             | 37.4%   | 35.1%   | 55.1%          | 16.5%           | 48.5%  | 32.4%   | 47.4%    | 26.6%     | 42.4%          | 27.5%  | 32.2%           |
| Company or Private Auto          | 35.2              | 27.4    | 30.1    | 39.3           | 64.2            | 13.3   | 40.6    | 25.9     | 23.3      | 51.3           | 60.1   | 35.3            |
| Taxi/Cab/Limousine               | 35.0              | 46.6    | 18.3    | 46.3           | 33.4            | 26.3   | 40.6    | 21.9     | 34.2      | 35.0           | 13.6   | 34.3            |
| Rented Auto                      | 33.8              | 34.6    | 44.8    | 28.8           | 48.8            | 19.2   | 27.0    | 51.3     | 38.7      | 21.4           | 29.6   | 42.1            |
| City Subway/Tram/Bus             | 25.8              | 30.6    | 22.0    | 35.4           | 11.6            | 8.9    | 25.1    | 15.9     | 21.2      | 26.4           | 17.8   | 7.5             |
| Bus between Cities               | 11.0              | 11.6    | 6.6     | 15.1           | 9.4             | 5.8    | 8.4     | 14.1     | 16.2      | 19.7           | 10.0   | 4.9             |
| Railroad between Cities          | 9.9               | 7.8     | 13.2    | 15.9           | 7.6             | 18.3   | 6.9     | 12.1     | 4.1       | 7.0            | 7.5    | 4.4             |
| Motor Home/Camper                | 1.7               | 1.7     | 1.6     | 1.1            | 2.9             | 17.1   | 0.7     | 1.3      | 0.5       | 1.2            | 3.6    | -               |

\*Column percentages may not total to 100 percent due to multiple responses.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 36

**TRIP EXPENDITURES  
OVERSEAS AND MEXICAN LEISURE VISITORS TO CALIFORNIA  
(2005)**

- Overseas leisure travelers in 2005 reported total expenditures in the U.S. of \$1,750, four percent higher than that reported in 2004 (\$1,677). The 2005 mean daily expenditure was \$89 per visitor, up 6% from \$84 per day in 2004. As a comparison, all overseas travelers to California reported U.S. expenditures of \$2,008 or \$103 per day (Table 19).
- Leisure visitors from Australia/New Zealand reported the highest international airfare per visitor per trip (\$1,954), while Mexican and U.K. air travelers reported the least expensive international airfare (\$1,041 and \$1,095, each respectively).

| AVERAGE PER VISITOR TRIP<br>EXPENDITURES | COUNTRY OF RESIDENCE OF VISITORS |         |         |                |                 |         |         |          |           |                |         |                 |
|--|----------------------------------|---------|---------|----------------|-----------------|---------|---------|----------|-----------|----------------|---------|-----------------|
|  | TOTAL<br>OVERSEAS                | U.K.    | GERMANY | NEW<br>ZEALAND | CHINA<br>w/o HK | INDIA   | JAPAN   | MALAYSIA | SINGAPORE | SOUTH<br>KOREA | TAIWAN  | MEXICO<br>(AIR) |
| ESTIMATED TRAVELERS                      | 2,930,000                        | 630,000 | 186,000 | 287,000        | 44,000          | 25,000  | 327,000 | 10,000   | 33,000    | 128,000        | 94,000  | 381,000         |
| TOTAL TRIP                               | \$3,350                          | \$2,753 | \$3,169 | \$4,609        | \$3,054         | \$2,095 | \$2,984 | \$3,267  | \$3,434   | \$3,002        | \$3,516 | \$2,920         |
| (Number of Respondents)                  | (2,040)                          | (297)   | (76)    | (473)          | (21)            | (13)    | (410)   | (34)     | (55)      | (62)           | (232)   | (52)            |
| INCLUSIVE TOUR PRICE                     | \$2,174                          | \$2,085 | \$2,623 | \$2,980        | \$5,000         | \$2,500 | \$2,002 | \$1,330  | \$1,561   | \$1,345        | \$1,443 | \$5,206         |
| (Number of Respondents)                  | (600)                            | (138)   | (38)**  | (109)          | (1)**           | (1)**   | (171)   | (4)**    | (12)**    | (13)**         | (51)**  | (11)**          |
| INTERNATIONAL AIRFARE                    | \$1,376                          | \$1,095 | \$1,243 | \$1,954        | \$1,450         | \$1,583 | \$1,299 | \$1,385  | \$1,465   | \$1,268        | \$1,334 | \$1,041         |
| (Number of Respondents)                  | (2,345)                          | (320)   | (76)**  | (569)          | (27)**          | (21)**  | (386)   | (41)**   | (60)**    | (86)**         | (296)   | (74)**          |
| EXPENDITURE IN U.S.*                     | \$1,750                          | \$1,444 | \$1,400 | \$2,392        | \$1,638         | \$1,154 | \$1,369 | \$1,835  | \$1,978   | \$1,692        | \$2,092 | \$1,387         |
| (Per Day)                                | \$89                             | \$95    | \$64    | \$105          | \$42            | \$16    | \$166   | \$115    | \$96      | \$84           | \$99    | \$157           |
| (Number of Respondents)                  | (2,403)                          | (351)   | (87)**  | (530)          | (27)**          | (21)**  | (499)   | (40)**   | (77)**    | (74)**         | (265)   | (63)**          |
| MEAN ITEMIZED EXPENDITURES IN U.S.*      |                                  |         |         |                |                 |         |         |          |           |                |         |                 |
| (NUMBER OF RESPONDENTS)                  | (2,403)                          | (351)   | (87)**  | (530)          | (27)**          | (21)**  | (499)   | (40)**   | (77)**    | (74)**         | (265)   | (63)**          |
| TRANSPORT IN U.S.                        | \$256                            | \$203   | \$177   | \$303          | \$213           | \$239   | \$191   | \$220    | \$273     | \$379          | \$353   | \$190           |
| LODGING IN U.S.                          | \$383                            | \$338   | \$340   | \$527          | \$212           | \$130   | \$277   | \$485    | \$306     | \$160          | \$295   | \$374           |
| FOOD, BEVERAGES                          | \$383                            | \$406   | \$388   | \$441          | \$391           | \$190   | \$280   | \$353    | \$484     | \$285          | \$388   | \$274           |
| GIFTS, SOUVENIRS                         | \$382                            | \$233   | \$239   | \$540          | \$412           | \$352   | \$370   | \$546    | \$434     | \$528          | \$669   | \$213           |
| ENTERTAINMENT                            | \$215                            | \$189   | \$155   | \$450          | \$190           | \$164   | \$144   | \$161    | \$317     | \$153          | \$247   | \$157           |
| OTHER                                    | \$102                            | \$51    | \$75    | \$109          | \$194           | \$41    | \$61    | \$56     | \$148     | \$156          | \$94    | \$167           |
| AVERAGE NIGHTS IN U.S.                   | 19.8                             | 15.1    | 21.8    | 22.8           | 38.5            | 74.0    | 8.3     | 16.0     | 20.6      | 20.2           | 21.2    | 8.9             |
| AVERAGE NIGHTS IN CALIF.                 | 10.5                             | 7.5     | 11.6    | 8.7            | 26.0            | 51.8    | 6.2     | 11.2     | 11.9      | 14.5           | 14.6    | 6.2             |
| <u>MEDIAN NIGHTS IN CALIFORNIA</u>       | 7.0                              | 7.0     | 7.0     | 7.0            | 10.0            | 17.0    | 4.0     | 11.0     | 8.0       | 7.0            | 8.0     | 6.0             |

\*Overseas visitors on exclusive tour packages were excluded.

\*\*Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

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Table 37

**EXPENDITURES**  
**OVERSEAS AND MEXICAN LEISURE VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS\***  
**(2005)**

- Approximately thirty-eight percent of overseas leisure visitors to California did not visit any other state in the U.S. These California-only leisure visitors reported spending \$2,875 per capita on their entire trip, nine percent more than the \$2,628 spent in 2004. Approximately half of their total trip expenditures were in California (\$1,378).
- Average daily California expenses for California-only leisure visitors was \$87, up 12% from the \$78 per day reported in 2004.

| <u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>       | <u>ALL CALIFORNIA-ONLY VISITORS</u> |
|--|-------------------------------------|
| TOTAL TRIP   | \$2,875                             |
| (NUMBER OF RESPONDENTS)                            | (883)                               |
| INCLUSIVE TOUR PRICE                               | \$2,289                             |
| (NUMBER OF RESPONDENTS)                            | (181)                               |
| INTERNATIONAL AIRFARE                              | \$1,379                             |
| (NUMBER OF RESPONDENTS)                            | (1,048)                             |
| EXPENDITURE IN CALIFORNIA                          | \$1,378                             |
| PER DAY  | \$87                                |
| (NUMBER OF RESPONDENTS)                            | (1,074)                             |
| <u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u> |                                     |
| (NUMBER OF RESPONDENTS)                            | (1,074)                             |
| TRANSPORT IN U.S.                                  | \$170                               |
| LODGING  | \$273                               |
| FOOD, BEVERAGES                                    | \$293                               |
| GIFTS, SOUVENIRS                                   | \$365                               |
| ENTERTAINMENT                                      | \$124                               |
| OTHER  | \$121                               |
| <u>AVERAGE NIGHTS IN CALIFORNIA</u>                | 12.8                                |

\*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2005.

CIC Research, Inc.

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## **APPENDIX A**

### **SURVEY BACKGROUND**

#### **Introduction**

This report on overseas visitors to California is based on data compiled from the Office of Travel & Tourism Industries (ITA – OTTI), Survey of International Air Travelers. The survey information is collected from passengers through questionnaires covering the traveler, the air trip, activities and places visited, and air travel expenditures.

The survey is conducted voluntarily by selected major airlines on a sample of their international flights departing from U.S. airports. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used to guide planning oriented toward the activities of international air travelers for both the public and private sectors.

#### **Questionnaire Content**

The survey questionnaire is designed to obtain responses from U.S. as well as non-U.S. residents. The questionnaire contains questions about the travelers (e.g., age, sex, family income, country and city of residence, previous travel experience, etc.). It also contains many basic questions about the current trip (e.g., type of air ticket, travel party composition, nights away from home, trip purpose, etc.).

The distinguishing features of this questionnaire are the complete trip itinerary and the trip expenditure data items. These items collect more complete data on these areas than are available elsewhere. Every major destination visited is covered, as is the length of stay and the type of accommodations utilized. Travel expenditures are also covered by type of expenditure. The entire questionnaire is reproduced in Appendix B.

#### **Survey Operations**

Data are collected monthly through in-flight passenger surveys conducted on a sample of the participating airlines' scheduled international flights that depart from United States airports during the seven days beginning with the third Monday of the month. Participating airlines receive advance listings of the flights to be surveyed, followed by a survey kit for each sample flight. The kits each contain instructions and questionnaires in the appropriate language. (The questionnaire is available in English, French, German, Italian, Japanese, Spanish, Korean and Chinese).

Airline cabin personnel distribute the self-administered questionnaires to all adult passengers and collect the completed forms prior to debarkation.

#### **Sample Design**

The sample is designed around the geographic detail desired for the resulting estimates and the specific airlines willing to participate in the survey. The design is a stratified, two-stage cluster sample, where scheduled flights are randomly selected from strata defined by airline and foreign destination in the first stage of the sample. When the survey is conducted on a selected flight, those passengers who respond are considered to represent all passengers on that flight.

#### **Understanding the Estimates**

Since airline participation is voluntary and changes from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travel.

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With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service. Passengers on charter flights and persons traveling by air between the U.S. and Canada are excluded.

The estimates are subject to a certain amount of error resulting from the sampling, data collection, and estimation processes. Because of the complicated nature of the sample design and the resulting computational burden, sampling variability has not been calculated for the estimates. Instead, an indication of the reliability of a set of related estimates is given by the number of respondents to the relevant questionnaire items. The reader must exercise judgment in determining the amount of confidence to place in an estimate and in its proper use. For example, an estimate based on 500 respondents is more reliable than one based on 200 respondents. Several kinds of estimates appear in the tables. The majority are in the form of percent distributions of the responses to questionnaire items. Distributions for items allowing only one choice of response will total to 100 percent. Those allowing more than one choice may total to more than 100 percent. Where the symbol "--" appears, this means that no or limited data is available for that response.

In addition to estimates of percents, estimates of means and medians are shown for travel party size, age, annual family income, number of nights stayed and by type of accommodations.

## Definitions

Notes of explanation for selected variables appearing in the row headings of the tables are given below.

Residence of Visitors: In the overseas tables the major traffic-generating countries are listed by world regions, as described in Appendix C. Countries not listed are combined by region into the "Other Region X" categories.

Type and Size of Travel Party: A travel party can fall into only one of these categories: traveling alone; family group; business group; and mixed business, family, and other. These four categories total 100 percent. A party is classified as mixed if the party is a combination of two or more of the other categories. Mean and median party size are computed from the distribution of frequencies of parties of different sizes (for example, three passengers traveling together are counted as a single party in the frequency distribution from which mean and median party size are computed).

Air Expenditures: The amounts shown for mean international airfare and mean expenditures while in the United States on this trip are those amounts spent over and above any inclusive tour expenditures paid prior to beginning the trip. The categories are mutually exclusive.

Mean: The mean is the sum of all responses divided by the number of responses.

Median: The median is that value for which 50 percent of the values lie below it and 50 percent are above it.

Leisure Visitors: Are defined as those visitors whose main purpose of trip is vacation/holidays or visiting friends/relatives.

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**APPENDIX B**  
**QUESTIONNAIRE**

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**UNITED STATES DEPARTMENT OF COMMERCE  
United States International Trade Administration**

**SURVEY OF  
INTERNATIONAL  
AIR TRAVELERS**

**DEPARTING THE UNITED STATES**

Dear International Traveler:

Please help the travel industry improve the services they offer you. The information collected in this survey is used by airlines, travel agents, hotels, government travel offices, and other travel planners and providers to understand you, the international traveler, and thereby take steps to improve your next international trip.

This questionnaire is designed to be completed by both non-U.S. residents who have visited the country and U.S. residents traveling abroad. If you are 18 years of age or older, please complete this voluntary survey. **ONLY ONE RESPONSE PER FAMILY GROUP, PLEASE.**

Upon completing this survey, please return it to the person who provided it to you. The estimated average time to complete this questionnaire is 15 minutes. Should you have any comments regarding this survey, please send them to Tourism Industries, ITA, Washington DC 20230, or Office of Information and Regulatory Affairs, OMB, Project 0605-0007, Washington, DC 20503.

Thank you for your cooperation on this important survey.

This survey also available in Japanese, French, German, Spanish, Chinese, Korean, Polish, Portuguese, Russian, Italian.

OMB CLEARANCE NO. 0605-0007

ONLY ONE RESPONSE PER FAMILY, PLEASE

- 1a. Date
- b. Name of Airline
- c. Flight Number
- d. Please rate your general impression of this airline.

Mark (X) ONE

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Fair
- ☐ Poor

- 2a. What are your City, State, ZIP (postal) Code, and Country of Residence? - *Specify*

- b. If this flight is part of an outbound journey from your home, what will be the main destination on your trip? - *Specify*

- c. For NON-US Residents ONLY  
If this flight is part of the return journey to your home, what was the main destination that you visited since you left home? - *Specify*

- 3a. What is your country of CITIZENSHIP? - *Specify*

- b. What is your country of BIRTH?

*US Residents – SKIP to question 4b*

- 4a. For Non-US Residents ONLY  
At what city or airport did you pass through U.S. Customs/Immigration? - *Specify*

- 4b. If you are a US resident, at what city or airport will you pass through U.S. Customs/immigration when

you return?

--- *Specify*

- 5a. At what airport did or will you board this aircraft today?

--- *Specify*

- b. Did you make a connecting flight?

☐ No

☐ Yes – From which airport? - *Specify*

- c. At which airport will you leave this aircraft? - *Specify*

- d. Once there, are you making a connecting flight?

☐ No

☐ Yes – To which City? --*Specify*

6. How did you obtain information used to plan your trip?

Mark (X) ALL that apply

- ☐ Airlines directly
- ☐ In-flight information systems
- ☐ National government tourist office
- ☐ State/City travel office
- ☐ Friends or relatives
- ☐ Travel agency
- ☐ Travel guides
- ☐ Tour company
- ☐ Corporate travel department
- ☐ Newspaper/Magazine
- ☐ TV/Radio
- ☐ Personal computer

7. How long before you departed on this trip did you –

Decide to travel?

Make airline reservation?

8. How were your AIRLINE reservations for this trip made?

Mark (X) ONE

- ☐ A travel agent
- ☐ Travel club
- ☐ The Airline directly
- ☐ The company's travel department
- ☐ Tour operator
- ☐ Personal computer
- ☐ Don't know
- ☐ Other



9a. **Were commercial LODGING reservations made for this trip before you left home?**

**Mark (X) ONE**

- ☐ Yes – Go to question 9b  
☐ No – SKIP to question 10a

b. **These reservations were made through.....**

**Mark (X) ALL that apply**

- ☐ A travel agent  
☐ The hotel/motel staff directly  
☐ The company's travel department  
☐ A tour operator  
☐ Airline staff  
☐ A friend or relative  
☐ Business associate  
☐ Other

10a. **What is/was the MAIN purpose of your trip?**

**Mark (X) ONE**

- ☐ Business/Professional  
☐ Convention/Conference/Trade show  
☐ Leisure/Recreation/Holidays/Sightseeing  
☐ Visit friends/Relatives  
☐ Government affairs/Military  
☐ Study/Teaching  
☐ Religion/Pilgrimages  
☐ Health treatment  
☐ Other – Specify --

CONTINUE WITH QUESTION 10B

10b. **Does this trip have any other purposes?**

**Mark (X) ALL that apply**

- ☐ Business/Professional  
☐ Convention/Conference/Trade show  
☐ Leisure/Recreation/Holidays/Sightseeing  
☐ Visit friends/Relatives  
☐ Government affairs/Military  
☐ Study/Teaching  
☐ Religion/Pilgrimages  
☐ Health treatment  
☐ Other – Specify --

11. **With whom are you traveling now?**

**Mark (X) ALL that apply**

- ☐ Spouse  
☐ Family/Relatives  
☐ Business associate(s)  
☐ Friend(s)  
☐ Tour group  
☐ Traveling alone

12. **Altogether, how many adults and/or children are in your travel party?** Exclude your tour group members unless you knew them and planned to travel with them prior to booking the tour.

**Number of adults**

**Number of children**

**Under 18 years old**

13. **How many nights away from home will you spend or have you spent on this trip?**

**Number of nights in the USA**

(including U.S. territories)

**Number of nights outside**

**the USA**

14. **IN ORDER OF VISIT, list the principal places visited or to be visited on this trip. and indicate the number of nights at each place.** Under number nights, if you did not or will not stay overnight at a place visited, enter "0". Under the section for type of lodging, indicate the lodging company name, or check the appropriate space

| Destinations (Cities/Attractions)<br>Enter ONLY ONE destination per line | State or Country | Number of Nights | Type of Lodging<br>Select ONE per line |              |       |
|--|------------------|------------------|--|--------------|-------|
|  |                  |                  | Hotel/Motel<br>Specify name of company | Mark (X)     |       |
|  |                  |                  |  | Private Home | Other |
| 1.   |                  |                  |  |              |       |
| 2.   |                  |                  |  |              |       |
| 3.   |                  |                  |  |              |       |
| 4.   |                  |                  |  |              |       |
| 5.   |                  |                  |  |              |       |
| 6.   |                  |                  |  |              |       |
| 7.   |                  |                  |  |              |       |

15a. **Is this trip part of a package?** Mark (X) ONE

☐ No --- SKIP to question 16

☐ Yes --- **Which of the following does your package include?**

Mark (X) ALL that apply

- ☐ Airfare  
☐ Rental car  
☐ Tour escort for entire trip  
☐ Cruise  
☐ Intercity bus/Coach transportation  
☐ Commercial guided tours  
☐ Commercial lodging – **How many nights lodging are included?**

b. **How many days prior to departure was this package booked?**  
---Specify

c. **What is the approximate cost of your prepaid package?**

Please give your answer in U.S. dollars or your own country's currency.

**IF OTHER THAN U.S. CURRENCY**

Specify country of currency used.

16. **About your trip expenditures... please estimate the amount of money spent, or expected to be spent for the following items.** Please remember your name is not on this form. Your cooperation in completing this important question is appreciated.

a. **Please estimate how much money you spent, or will spend, outside your own country.** Do not include those items which were covered in the package mentioned in 15c above. --- Specify

b. **Country of currency used for estimate** ---Specify

c. **How many people are covered by this expenditure estimate?**  
Specify total number of people.

d. **What was the total cost of your international air travel tickets? –**  
Specify

☐ Mark (X) here if you do NOT know cost of tickets.

e. **Are these ONE WAY tickets?**

Mark (X) ONE

- ☐ Yes  
☐ No

f. **How much did you spend at the airport of your USA departure? –**  
Specify

**U.S. Residents – SKIP to question 17.**

**For Non-U.S. Residents ONLY**

g. Of the total expenditure given in 16a,  
**Please estimate how much was spent in the USA.** --- Specify

h. Of the total expenditure given in 16g above, **please estimate how much was for---**

1. **Transportation**

2. **Lodging**

3. **Foods and beverages**

4. **Gifts, souvenirs and other purchases**

5. **Entertainment and recreation**

6. **Other spending (if any)**

**17. Please tell us about how you did, or will, pay for your expenses on this trip--**

| Type of payment           | Percentage paid<br>For expenses | Company(ies) of issue |
|---------------------------|---------------------------------|-----------------------|
| <b>Credit card(s)</b>     | %                               |                       |
| <b>Travelers check(s)</b> | %                               |                       |
| <b>Debit card(s)</b>      | %                               |                       |
| <b>Cash</b>               | %                               |                       |
| <b>TOTAL</b>              | <b>100%</b>                     |                       |

**18. What types of transportation did you, or will you, use when reaching your destination on this trip?**

*Mark (X) ALL that apply*

- ☐ Airlines within the USA
- ☐ Airlines outside the USA
- ☐ Railroad between cities
- ☐ Rented auto --- *Specify company name*

- ☐ Taxi/Cab/Limousine
- ☐ City subway/Tram/Bus
- ☐ Bus between cities
- ☐ Company or private auto
- ☐ Motor home/Camper

**19. Which of the following leisure activities did you, or will you, spend time on during this trip?**

*Mark (X) ALL that apply*

- ☐ Shopping
- ☐ Dining in restaurants
- ☐ Amusement/Theme parks
- ☐ Visiting historical places
- ☐ Visiting casinos/Gambling
- ☐ Commercial guided tours
- ☐ Visiting small towns and villages
- ☐ Cultural heritage sights/Activities
- ☐ Touring the countryside
- ☐ Water sports/Sunbathing
- ☐ Ranch vacations
- ☐ Cruises
- ☐ Hunting/Fishing
- ☐ Snow skiing
- ☐ Golfing/Tennis
- ☐ Environmental/Ecological excursions
- ☐ Visiting national parks
- ☐ Visiting American Indian communities
- ☐ Attending sports event
- ☐ Concert/Play/Musical
- ☐ Art gallery/Museum
- ☐ Sightseeing in cities
- ☐ Nightclubs/Dancing
- ☐ Ethnic heritage sights/Activities

**20. Please rate this airline for this trip on each of the following attributes.**

|  | Excellent                  | Good                       | Average<br>Did Not Use     | Fair                       | Poor                       |                            |
|--|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| a. Convenient schedule<br>0 <input type="checkbox"/> | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> |                            |
| b. Ticket price                                      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| c. Reservation service                               | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| d. Check-in waiting time                             | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| e. Check-in personnel                                | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| f. Airline club/lounge                               | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| g. On-time departure                                 | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| h. Food/Beverage quality                             | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| i. Flight attendant service                          | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| j. Audio/Video                                       | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| k. Cabin cleanliness                                 | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| l. Cabin noise level                                 | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| m. Seat comfort                                      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| n. Cabin layout                                      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| o. Carry-on storage space                            | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| p. Overall evaluation of aircraft                    | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| q. Overall evaluation of flight                      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |

**21. Would you choose or recommend this airline for your next trip on this route?**

Mark (X) ONE

- ☐ Definitely would  
☐ Probably would  
☐ Probably would not  
☐ Definitely would not  
☐ Not sure

**22. What were your three main reasons for flying on THIS AIRLINE?** Indicate by marking "1" for the most important reasons, "2" for the next most important reason, and "3" for the third most important reason. DO NOT indicate more than three reasons.

|  |   |
|--|---|
| <input type="checkbox"/> Airfare             | <input type="checkbox"/> On-time reputation                   |
| <input type="checkbox"/> Convenient schedule | <input type="checkbox"/> Previous good experience             |
| <input type="checkbox"/> Non-stop flights    | <input type="checkbox"/> Mileage bonus/Frequent flyer program |
| <input type="checkbox"/> Employer policy     | <input type="checkbox"/> In-flight service reputation         |
| <input type="checkbox"/> Safety reputation   | <input type="checkbox"/> Not involved in choice of carrier    |
| <input type="checkbox"/> Loyalty to carrier  | <input type="checkbox"/> Other ----- Specify                  |

**23a. Where are you sitting today?**

Mark (X) ONE

- ☐ First class  
☐ Executive/Business class  
☐ Economy/Tourist/Coach

**b. What type of airline ticket do you have?**

Mark (X) ALL that apply

- ☐ First class  
☐ Executive/Business class  
☐ Economy/Tourist/Coach  
☐ Frequent flyer free ticket  
☐ Frequent flyer upgrade  
☐ Discount/Group fare  
☐ Non-revenue  
☐ Don't know

- 24. Please rate the following attributes of the AIRPORT from which you have just departed (or are currently waiting to depart) the United States.**  
*Mark (X) ONE rating for each*

|                                      | Excellent                  | Good                       | Average<br>Did Not Use     | Fair                       | Poor                       |                            |
|--------------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| a. Airport access                    | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| b. Ground transportation             | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| c. Airport terminal convenience      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| d. Airport terminal cleanliness      | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| e. Concession goods/Services         | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| f. Concession prices                 | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| g. Terminal seating availability     | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| h. International Traveler facilities | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| i. Security measures                 | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |
| j. Overall airport evaluation        | 5 <input type="checkbox"/> | 4 <input type="checkbox"/> | 3 <input type="checkbox"/> | 2 <input type="checkbox"/> | 1 <input type="checkbox"/> | 0 <input type="checkbox"/> |

**U.S. residents --- SKIP to question 26a**

**25 a. For Non-U.S. Residents Only:**

**When entering the USA, please rate your Immigration and Naturalization Service/Passport Control and U.S. Customs experience at the airport where you entered the USA.**

*Mark (X) ONE rating for each*

|                                     | Excellent  | Good | Average | Fair | Poor |   |
|-------------------------------------|------------|------|---------|------|------|---|
|                                     | Don't Know |      |         |      |      |   |
| <b>a. Passport Control</b>          |            |      |         |      |      |   |
| (1) Processing time                 | 5          | 4    | 3       | 2    | 1    | 0 |
| (2) Staff courtesy                  | 5          | 4    | 3       | 2    | 1    | 0 |
| <b>b. Customs baggage clearance</b> |            |      |         |      |      |   |
| (1) Processing time                 | 5          | 4    | 3       | 2    | 1    | 0 |
| (2) Staff courtesy                  | 5          | 4    | 3       | 2    | 1    | 0 |

**b. About how long did it take you to clear Passport Control and Customs when entering the United States?**

*Specify in minutes*

**Baggage delivery waiting time**

*Mark (X) ONE rating*

- ☐ Excellent  
☐ Good  
☐ Average  
☐ Fair  
☐ Poor  
☐ Don't know

**26a. Did you have personal safety concerns before you started your international trip?**

*Mark (X) ONE*

- ☐ Yes  
☐ No

**b. Did your concerns cause you to change your travel plans?**

*Mark (X) ONE*

- ☐ Yes  
☐ No

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**26c. For Non-U.S. Residents ONLY****Was your personal safety actually endangered while in the USA?**

Mark (X) ONE

Ⓐ No – Go to question 27

Ⓑ Yes – Indicate the city(ies) where incidents(s) took place and mark (X) the appropriate category(ies) below.

| City | Incidents – Mark (X)     |                              |                    |                            |                   |                  |
|------|--------------------------|------------------------------|--------------------|----------------------------|-------------------|------------------|
|      | Harassment/<br>Arguments | Assault/<br>Physical<br>Harm | Burglary/<br>Theft | Transportation<br>accident | Health<br>Problem | Other -- Specify |
|      |                          |                              |                    |                            |                   |                  |
|      |                          |                              |                    |                            |                   |                  |
|      |                          |                              |                    |                            |                   |                  |

**27a. Is this your first trip by air to/from the United States?**

Mark (X) ONE

Ⓐ Yes – SKIP to question 28

Ⓑ No – Go to question 27b

**b. Altogether, how many round trips by air have you made to/from the United States ---**

In the past 12 months?

In the past 5 years?

**28. Please give us some information about yourself.****a. What is your occupation?**

Mark (X) ONE

Ⓐ Manager/Executive

Ⓑ Professional/Technical

Ⓒ Clerical/Sales

Ⓓ Craftsman/Mechanic/Factory worker

Ⓔ Government/Military

Ⓕ Homemaker/

☐ Retired☐ Student☐ Other -- Specify**b. Age****c. Gender ---Mark (X) ONE**☐ Female☐ Male**29. What is the total combined yearly income of all members of your household? Give your answer either in USA dollars or in your own country's currency. Please specify the country of currency if NOT USA dollars.**

In USA dollars ---

OR

In currency other than USA dollars –

Specify

Mark (X) ONE

☐ Under \$20,000☐ \$20,000 - \$39,999☐ \$40,000 - \$59,999☐ \$60,000 - \$79,999☐ \$80,000 - \$99,999☐ \$100,000 – \$119,999☐ \$120,000 – \$139,999☐ \$140,000 -- \$159,999☐ \$160,000 -- \$179,999☐ \$180,000 -- \$199,999☐ \$200,000 and aboveTotal annual  
household income

Country of currency

**THANK YOU FOR COMPLETING THIS QUESTIONNAIRE.**  
**WE HOPE YOUR TRIP WAS OR WILL BE AN ENJOYABLE ONE.**

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## APPENDIX C

### WORLD BY REGION AND COUNTRY OR TERRITORY

#### Mexico

Mexico City  
Guadalajara  
Monterey  
Acapulco  
Other Mexico

#### Central America

Belize  
Costa Rica  
El Salvador  
Guatemala  
Honduras  
Nicaragua  
Panama Republic  
San Andres Island

#### South America

Argentina  
Bolivia  
Brazil  
Chile  
Colombia  
Ecuador  
French Guiana  
Guyana  
Paraguay  
Peru  
Surinam  
Uruguay  
Venezuela

#### Caribbean

Anguilla Island  
Antigua  
Bahama Island  
Barbados  
Bermuda  
Cuba  
Dominica  
Dominican Republic  
Grand Cayman  
Grenada  
Guadeloupe  
Haiti  
Jamaica  
Martinique  
Montserrat Island  
Neth. Antilles  
Nevis  
Providential Islands  
St. Barthelemy  
St. Kitts  
St. Lucia  
St. Vincent  
Trinidad/Tobago  
Turks/Calcos  
Virgin Islands/UK

#### Europe

Austria  
Belgium  
Bosnia-Herzegovina  
Bulgaria  
Byelarus (Belarus)  
Croatia  
Czech Republic  
Denmark  
Finland  
France  
Georgia  
Germany  
Greece  
Holy See  
Hungary  
Iceland  
Ireland  
Italy  
Kazakhstan  
Kyrgyzstan  
Lithuania  
Luxembourg  
Malta  
Netherlands  
Norway  
Poland  
Portugal  
Romania  
Russia  
Slovakia  
Slovenia  
Spain  
Sweden  
Switzerland  
Tajikistan  
Turkmenistan  
Ukraine  
United Kingdom  
Uzbekistan  
Yugoslavia

#### Africa

Algeria  
Cameroon  
Canary Islands  
Cape Verde Island  
Ethiopia  
Gabon  
Ghana  
Guinea  
Ivory Coast  
Kenya  
Liberia  
Morocco  
Nigeria  
SW Africa/S. Africa  
Senegal  
Tanzania  
Togo  
Tunisia  
Zambia  
Zimbabwe

#### Middle East

Egypt  
Bahrain  
Cyprus  
Iran  
Iraq  
Israel  
Jordan  
Kuwait  
Lebanon  
Qatar  
Saudi Arabia  
Syria  
Turkey  
United Arab Emirates

#### Far East

Bangladesh  
Brunei  
China/Mainland  
China/Taiwan  
Hong Kong  
India  
Indonesia  
Japan  
Korea-South  
Malaysia  
Okinawa/Ry Island  
Pakistan  
Philippines  
Singapore  
Thailand

#### Oceania

Australia  
Cook Islands  
Fiji Islands  
French Polynesia  
Kiribati  
Micronesia  
Nauru Republic  
New Zealand  
Papua/New Guinea  
Tonga

